Workforce Management Web for Agents Help (Classic)

Workforce Management 8.5.2

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Welcome to Workforce Management (WFM) Web for Agents Help (Classic). Use this page to go directly to the information you need, or use the Table of Contents to take a step-by-step tour of all the features and functions in WFM Web for Agents.

> **Tip**
>
> Do you have questions about this Help or the WFM Web for Agents interface? See Recently Asked Questions

Getting Started

Become familiar with WFM Web for Agents.

- Logging In
- Menu Options
- Changing the Date
- Logging Out

Scheduling and Trading

Adjust your schedule and make schedule trades.

- My Schedule Pane
- Other Schedules Pane
- Trading Road Map
- Trading Windows for Specific Tasks

Availability and Preferences

Use availability patterns, add preferences, and request time off.

- Availability Patterns
- Changing Your Preferences
- Requesting and Editing Time Off
- Deleting and Recalling Time Off

Bidding and Configuration

Use schedule bidding and configure WFM Web for Agents.

- Bidding Scenarios
- Bidding Assignments and Details
- Configure Your Personal Pane
- Configure Shared Transportation

Overview

Use this Help to find all of the information you will need to understand the features in Workforce Management (WFM) Web for Agents and how it functions.

In the WFM Web for Agents window, there are two Help commands:

- To access the entire Help file, click **Help** on the menu bar (to the left of Log Out). The help window that appears includes a table of contents on the left, which provides access to all help topics.
- To access context-sensitive help, click the **Help** icon () at the top right of the WFM window itself (below **Log Off**). The help window that appears has no table of contents, and displays only the topic that describes the WFM dialog box or window that you are currently using.

Keyboard and Audio Navigation

Instead of using a mouse to click commands, you can press the Tab key to move the "focus" to the command that you want to execute, and then press **Enter** or the **Spacebar**.

WFM Web for Agents is compatible with the speaking tool JAWS 8. Consult the JAWS 8 manual for details about its functionality and operation.

Links to Other Topics

Inside help topics, underlined words and phrases are links to other topics. Click any link to go directly to the related topic.

To return to the topic from which you jumped, click your browser's **Back** button or press **Backspace**.

Touring All Features

Click on any topic in the Table of Contents at left side of the Help window to read about the corresponding feature.

Or you can click the links in the Learning About WFM Web section to begin exploring particular Help sections.

To find specific information, use the search function at the top of any page to search the Help or click the **Search this site** check box below the **Search** field to find related information in other documents.

Printing this Online Help

If you prefer to print the Help rather than use it online, complete the following steps:

1. In the Navigation pane, at the bottom of the Table of Contents, click **PDF Version**.
2. When the dialog opens, select:

- **Open with** to select the application, with which you want to view and print the Help. Adobe Acrobat v9 is recommended.
- **Save File** to save the Help to a folder on your computer.

- When the download is complete, navigate to the folder in which you saved the .pdf file and use the Print function in your application to print the file, or open and view the file on your computer offline.

Learning About WFM Web

To learn about WFM Web, click one of the links below:

Topic	Description
Getting Started	Summarizes browser and WFM Web basics, including how to log in and log off.
Schedule	Describes the Schedule window display.
Bidding	Explains how to review and respond to a bidding scenario.
Trading	Explains how to create, review, and respond to schedule trading proposals.
Preferences	Explains how to view, add, and edit Preferences in WFM Web.
Time Off	Describes the Time Off view and explains how to add, edit, or delete time-off requests.
Configuration	Describes the information about you that appears in the Configuration window.
About	Explains how to identify which WFM Web release you are using.

Recently Asked Questions

This article contains recently asked questions (RAQ) that might be helpful if you cannot find what you are looking for or have questions similar to those you'll find here. If you still have questions after reading this page, contact us by using the Disqus commenting feature at the bottom of each page.

We've also included information about things you cannot do.

Click the plus sign (+) beside any question to see the answer.

Time Off

[+] How do I check my available paid time off (PTO) balance?

Everything you need to know about your time-off balance can be found on the **Balance** view in the interface (click **Time Off** at the top of the interface to open this view).

You might also find this topic helpful: Balance Pane, which describes each time-off type balance. Specifically, see the row that describes Balances.

[+] How do I calculate my PTO balance after booking future PTO?

You don't have to calculate it, because WFM does this for you. Everything you need to know about your time-off balance can be found on the **Balance** view in the interface (click **Time Off** at the top of the interface to open this view).

You might also find this topic helpful: Balance Pane, which describes each time-off type balance. Specifically, see the row that describes Balances.

[+] How do I recall or delete time-off requests that I entered for dates in the past?

Agents can delete time-off requests for dates that occur in the past, but cannot recall time-off requests. See Deleting Time-Off Requests, which describes how to remove or delete time-off in the Calendar. If you are unable to delete the time-off request in the Calendar, ask your supervisor to remove it for you.

Note that time-off requests that are not scheduled, do not affect time-off balances.

[+] Where can I find a history of changes to my time-off?

You can see your time-off in the 12-month calendar for any day in the present or past. The calendar shows time-off requests in their current status. Days for which you have time-off requests are shown in color. The color changes, depending of the status of the request.

To see any existing time-off information in the Calendar for a particular day, hover the cursor over that day's cell. A pop-up window displays all the time-off information that exists for that day. It can include the date, name, start/end time, status, reason, and comments for the request.

If email notifications are used in your contact center, you would have received one every time your status changed, enabling you to save a history of changes to your time-off requests. If you are not receiving email notifications, ask your supervisor if they are used in your center.

[+] Where can I find credits for a "day in lieu of"?

WFM does not indicate days off in lieu of days/hours worked, and time-off balances show only the accrued, bonus, and carried-over time-off that you accumulate. You can find information about time-off in Time Off and the topics linked within it.

[+] Is it possible to check the time-off limits grid for an entire week or month, instead of just a single day?

Yes, you can check time-off limits for a day, week, month, or longer, depending on the dates you select before you click **New** to enter a time-off request, or "Edit" to change one. In the main Time-off Planner, instead of selecting only one day, select all of the dates that you want to see, for example, all the dates in a month or week. When the **Time-Off Limits** grid opens, you will be able to see the entire range of dates and the time-off limits in red.

Look at the procedure in the topic Requesting Time Off. You'll notice that the first step (before clicking "New") is to select the dates you want to see in the **Time-Off Limits** grid.

[+] How do I determine how many time-off requests are ahead of mine in the wait-list?

To determine where your request is in the wait-list queue, click the timestep in the Time-Off Limits grid. The pop-up information box provides the number of requests waiting for processing For example, you might be one of three people waiting, but time off is processed on a first-come, first served basis, so your request might not necessarily be the next one autogranted. Since every contact center has different time-off rules, limits, and autogrant settings for requests, Genesys recommends you ask your supervisor to provide more detail.

[+] When I submit a request for time off and it's wait-listed, when will I know if my request is approved or denied?

Workforce Management automatically wait lists time off requests on a first-come, first served basis, if the time requested is not available, and supervisors or administrators determine if autogranting is enabled for your site. After processing, you will see any approved (or denied) requests in the Time-Off

Balance pane on the left side of your screen. At the top of the Balance pane, you can select a time-off type to see all of the information described in this table Balance pane, including the status of your request (granted, declined, schedule, etc.).

Each contact center likely handles holidays differently, so I'd suggest speaking to your supervisor about how time-off is handled on holidays in your site.

[+] When I request time off and get an error message that the request date has not yet occurred, is there a way to be put on the wait list?

Talk to your supervisor or manager about the error message you are receiving. Every contact center has different rules, limits, and settings to manage time-off requests, based on how your supervisor or manager prefers to manage their teams or site.

If there are no issues with the request (no error message displays when you create it) and the requested time is unavailable, WFM automatically adds the request to the wait-list. WFM processes wait-listed requests on a first-come, first served basis, although there might be other limitations for full-day requests. Ask your supervisor if there are any limitations set for your team or site.

Schedules

[+] Where can I see any changes that were made to my schedule throughout the day?

Supervisors often make changes to schedules and in some centers, agents receive email notifications when this happens. If you are not receiving notification of changes, you might want to discuss this with your supervisor or team lead. Perhaps notifications have not been enabled in your contact center. This WFM feature is controlled and managed by supervisors and administrators.

Any other features that are available to you are visible in **Schedule** > **My Schedule**.

[+] How do I export my schedule to Outlook?

Currently, exporting WFM Schedules to Outlook is not supported in WFM. However, you can print your schedule. See the description of the **Print Schedule** button on this page: My Schedule.

Preferences and Availability Patterns

[+] What is the difference between creating an Availability Pattern and setting Preferences?

Adding preferences for shifts, availability, or a day off is usually a one-of entry. Meaning it's only applicable once, for the dates you specify. You can add more than one date (day), shift, or availability in the preference, but it doesn't establish a pattern for a specific time period.

Availability Patterns make it easy to set preferences that are the same for multiple weeks. Use them to set weekly patterns that you can reuse. For example, you might want to create an Availability Pattern to let your supervisor know that you are available for work between the hours of 8:00 am and 4:30 on Tues, Wednesday, and Thursdays for the next three weeks. Unless you create a pattern, you will have to enter your availability for each of the three weeks separately (even though your availability is the same for each of the three week).

Take a look at Preferences and Patterns. It might help you to understand when to use one or the other, or both.

[+] Do Availability Patterns affect schedule bidding?

Availability Patterns do not affect schedule bidding.

Changing Settings

[+] How do I change the timezone in my application?

You can change the site timezone in **Personal** . Take a look at the graphic on this page: The Personal Pane.

[+] How do I change the colors of my scheduled activities?

Supervisors control this WFM feature (colors of Schedule items). Perhaps you could speak to your supervisor about it.

[+] How do I change my application from the default view to Classic Agent?

In the upper right-hand corner of your view, click the down arrow beside your name and select **Classic Agent** in the drop-down list.

[+] How do I change the Web for Agents default view?

Agents cannot change the Web for Agents default view. Administrators set the view for teams, business units, sites or the entire contact center (not individual agents), depending on the version of WFM being used.

Logged In Session Expiry

[+] How do I extend the login time-out period to log back into Genesys?

The session length or duration generally depends on your browser configuration (Internet Explorer, Chrome, FireFox, etc.).

Here's our recommendation: When you log in, be sure to select the “Keep me logged in” option box. This will ensure your session doesn’t time out automatically. Also, clearing your cache will reset any session data in your browser, which might help. Use the browser Help to find out how to clear the cache in the browser you are using.

Things Agents *Cannot* Do

Sometimes you ask us about settings or functionality that you do not have access to or cannot change. Often they are controlled by supervisors or administrators, or governed by contact center policies or rules. It might be helpful for you to know what you *cannot* do.

[+] Are there things I cannot do?

Agents using Workforce Management cannot:

- Change the default version of Web for Agents.
- Change your password in WFM. Ask your supervisor how to do this in your contact center.
- Change the color scheme of items in the legend, schedule, or calendar.
- Recall time-off requests that occur in the past. Ask your supervisor to do this for you, if necessary.
- See *days off in lieu of* in your schedule or the calendar. Ask your supervisor about this, if you are requesting a day off *in lieu of*.
- Import your schedule into Outlook. WFM does not support this functionality.

About Window

The **About** dialog displays the WFM Web release number and copyright information.

Click the **Help** icon  in this dialog to open the contextual Help. Click **Close** to close the **About** dialog.

Getting Started

With Workforce Management (WFM) Web for Agents you can:

- View your schedule (on your desktop or iPhone).
- Select a scenario for schedule bidding.
- Indicate schedule preferences.
- See how much time off you have of each time-off type.
- Request time off.
- View other agents' schedules (if enabled at your site).
- Trade your schedule days with other agents (if enabled at your site).

Opening WFM Web

You can log into WFM Web from any computer or iPhone 4, iOS 5 or later mobile device that has a web browser running JavaScript, such as Microsoft Internet Explorer, Firefox, or Chrome. The splash screen displays when WFM Web is loading the **Log In** GUI.

Note that logging in using your iPhone requires that this feature be supported in your contact center. Ask your supervisor about support for this feature.

You will need the URL (web address) for WFM Web for Agents:

1. Ask your supervisor for the URL for WFM Web for Agents (for your desktop and smartphone).
2. After you are given this URL, add it to your browser's Favorites or Bookmarks list so that you can easily return to it.

> **Important**
> WFM Web is optimized for a screen resolution of at least 1024x768. At lower resolutions, some elements (such as table headers) might not display correctly.

Genesys recommends that you not run WFM Web in more than one browser window on the same workstation, because doing so can cause the program to behave unexpectedly. (In other words, do not open a second browser window on the same WFM Web session by selecting **File** > **New** or pressing **Ctrl+N**.)

However, you can start a separate WFM Web session by launching a separate instance of your browser, then logging in to WFM Web again from that browser.

Security Features

Whether you can view other agents' schedules, and whether they can view yours, depends on how your system administrator has set up WFM Web. However, other agents can never set preferences or make vacation requests for you, nor vice versa.

To improve on system security, an enhancement enables the timestamp information from the previous login to display in the GUI the next time you log in to WFM Web through the Agent or Agent Mobile interface, alerting you of any unauthorized use of your login credentials.

Where Next?

Login Timestamp

Menu Options

Changing the Date

Schedule

Bidding

Preferences

Trading

Time Off

Configuration

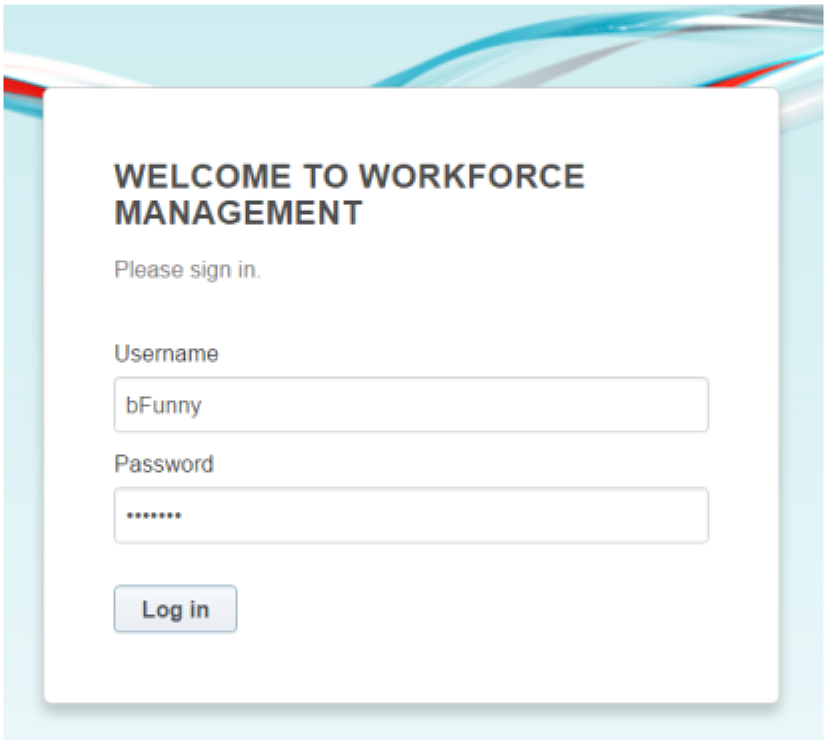
About WFM Web

Logging Out

Session Expiration

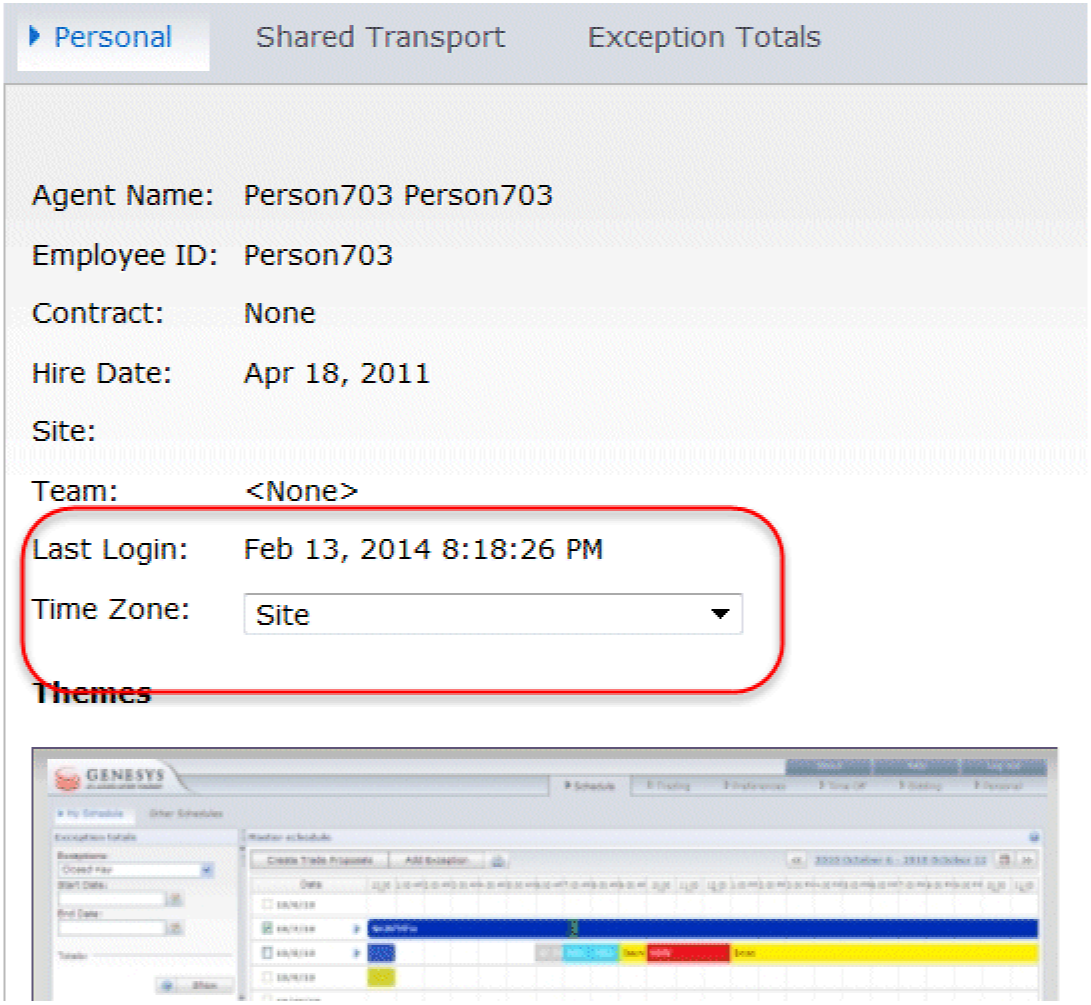
Logging In

Login Dialog



Open the Workforce Management (WFM) Web for Agents application. When the splash screen appears, log into WFM by entering your username and password.

Time Zone and Login Timestamp



After you log in through the Agent desktop or mobile interface, the WFM Web for Agents GUI displays the timestamp information from the previous login, alerting you of any unauthorized use of your login credentials.

The timestamp displays the date and time in the time zone that is shown in the drop-down list (**Site** is the default), in the **Configuration** module's **Personal** view.

In the Web for Agents mobile interface, WFM displays it in the **Dashboard** view below the version information.

Menu Options

Every WFM Web for Agents window displays the Menu Bar, which contains a set of navigation buttons. Click these buttons to move from window to window: Schedule, Trading, Preferences, Time Off, Bidding, or Configuration.

Important

- You might not see all of these items on your Menu Bar, depending on the options that have been configured for you.
- When WFM Web opens, it displays your schedule for the current week. See Changing the Date for help on how to display different weeks.

The buttons About, **Help**, and Log Out appear on every window.

Changing the Date

When you open WFM Web on your desktop or mobile device, the Daily Schedule window appears. It displays your schedule for the current week. To change the date, use the date arrow buttons Previous and Next or the pop-up calendar button. See the figure below.

Figure: Date and Calendar buttons

Similar buttons appear in other WFM Web windows. In some windows, they move you by different time intervals, as discussed below.

To use the date arrows:

- Click to move backward.
  - In the Schedule, Trading, and Preferences windows, you reach the previous week.
  - In the Time Off window, you reach the previous year.
- Click to move forward.
  - In the Schedule, Trading, and Preferences windows, you reach the next week.
  - In the Time Off window, you reach the next year.

To use the pop-up calendar:

1. Click the **Calendar** button.
   A calendar appears.
2. Set new dates.

- Click a day to select the week containing that day.
- Click the month drop-down list to jump to a different month.
- Click or on either side of the year to jump forward or back one year.

- Click **OK**.
  The window automatically refreshes to match your date selection.

Logging Out

When you are finished using WFM Web, it is important to always log out. If you do not log out, other users might be able to view your account information.

To log out:

- Click **Log out** from any WFM Web window.

This ends your WFM Web session and returns you to the Login window. You can now close your browser if you want to.

Tip
If your session expires, you are automatically logged out.

Session Expiration

A WFM Web session expires if you have not used it for a certain amount of time. If your session expires, the Session Expired warning appears when you attempt to use WFM Web.

To start using WFM Web again:

1. Click **OK** in the warning dialog box.
   The Login dialog box appears.
2. Enter your user name and password in the Login window that appears (just as you would to start using WFM Web).

If you are finished using WFM Web:

- Close your browser.

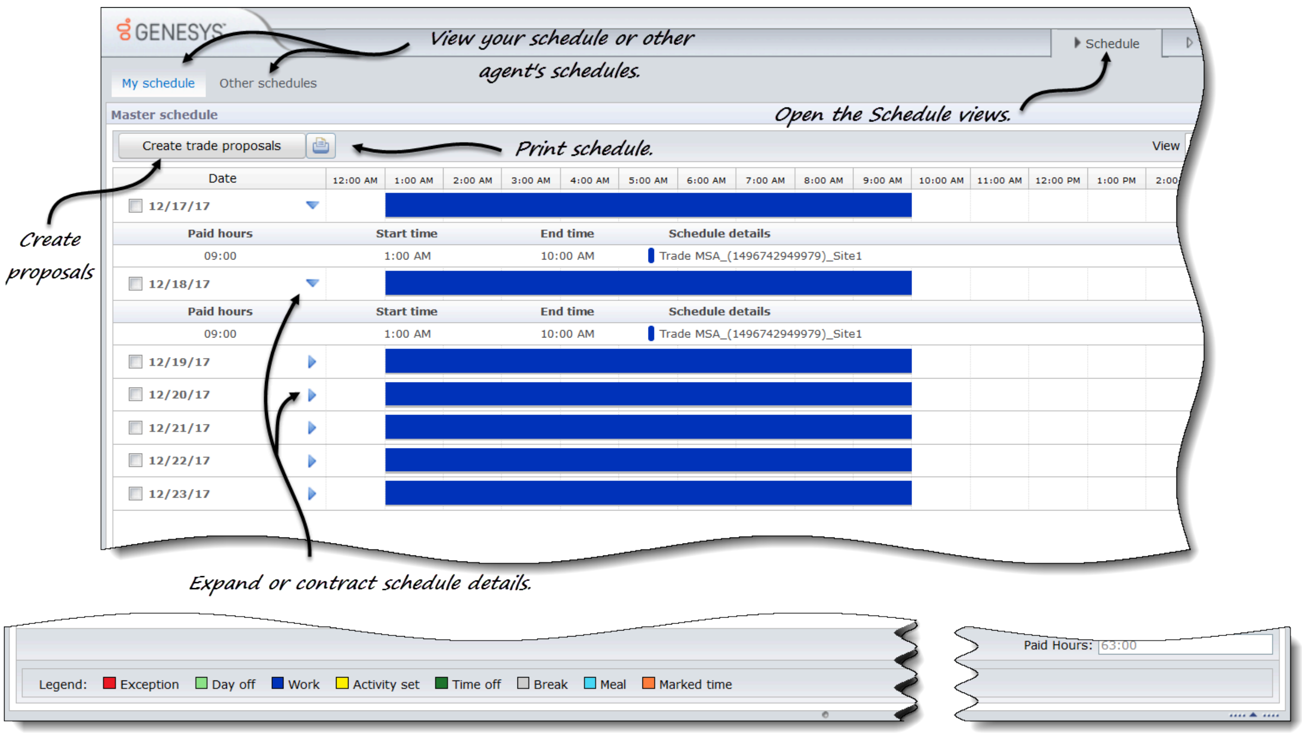
> ### Tip
> If your session expires, you are automatically logged off. See also, Logged In Session Expiry.

Schedule

The **Schedule** window provides access to two views:

- The My Schedule view displays your schedule information for the current week.
- The Other Schedules view displays other agent's schedules

Working in My Schedule view

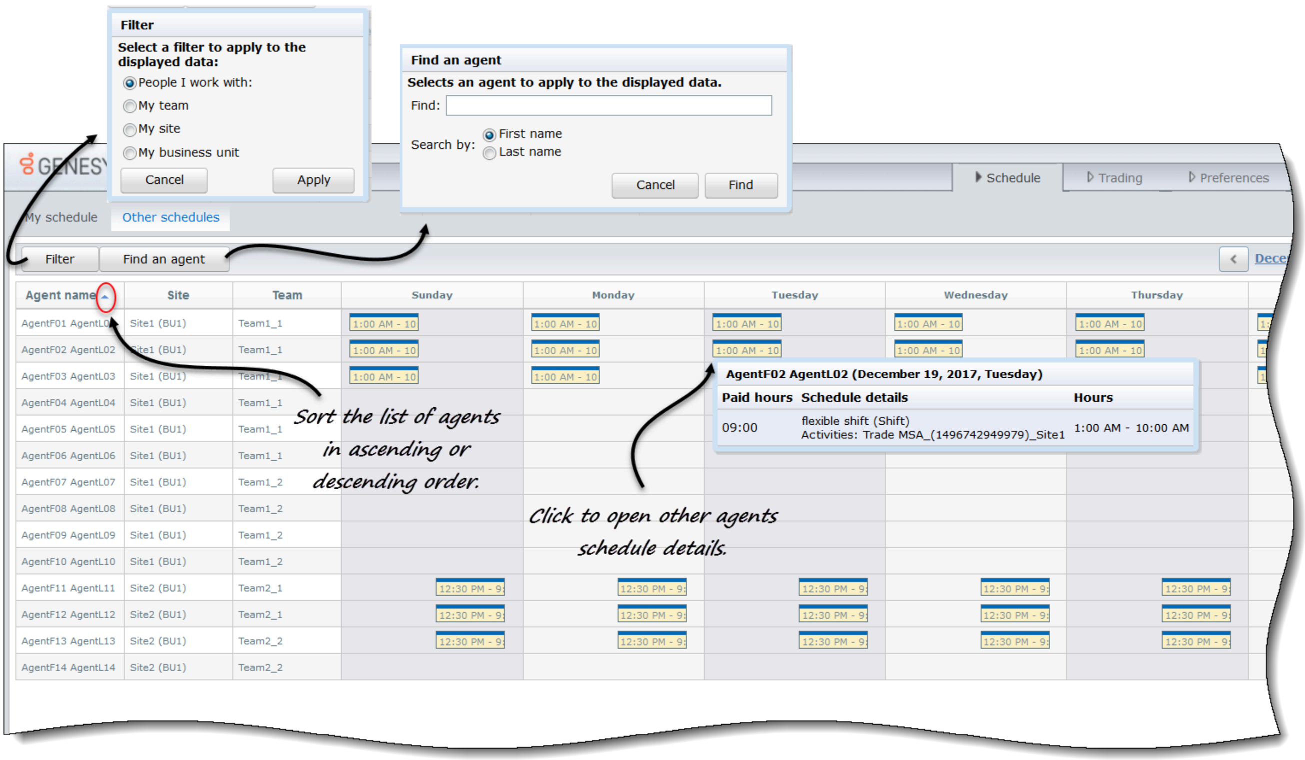


Use the **My Schedule** view to:

- View your current weekly schedule and its details, such as your shift start and end times, paid hours, and assigned activities.
- View your schedule for other weeks by changing the date.
- See where your break, meals and exceptions occur in your schedule, using the color-coded legend.
- Create trade proposals.
- Add exceptions to your schedule.
- Print your schedule.

The Legend at the bottom of your schedule explains colors in your schedule, indicating exceptions, days off, work items, activity sets, time off, breaks, meals, and marked time.

Working in Other Schedules view



Use the **Other Schedules** view to:

- View other agents current weekly schedules and their details.
- View other agents schedules for other weeks by changing the date.
- Filter the list of agents.
- Sort the list of agents.
- Find agents in the list.

My Schedule

The menu bar across the top of the My Schedules pane offers the following Web Services Menu Options: Schedule, Trading, Preferences, Time Off, Bidding, and Configuration. You might not see all of these items on your Menu Bar, depending on the options that have been configured for you.

The schedule itself displays colored graphical schedule bars and a drill-down schedule details section. Each line of the details section contains a small box whose color matches the corresponding portion of the schedule bar, in browsers such as Chrome, FireFox, and Internet Explorer.

Visual cues in the details view include full names of selected exceptions, breaks, and other items.

If your site allows schedule trading, this pane also displays trading messages and controls with the following contents:

Control	Description
Trading *message box*	This area, near the bottom of the window, alerts you to any open trade proposals or responses. It does so with a message of the form "You have unanswered trade requests." This message is a link; click it to open the Personal Proposals window (if you have trade proposals from others) or open the My Proposals window (if you have responses to your trade proposals).
Create trade proposals *button*	Opens the create trade proposals window, where you can create new trade proposals for the days whose check boxes you select below. **Note:** This button is hidden if this optional functionality is not enabled for you.
Add Exception *button*	Opens the Add Exception dialog box, where you can add an Exception for the day(s) that you have selected in this view. You can also enter a memo to provide more information about the exception, if necessary. **Note:** This button is hidden if this optional functionality is not enabled for you.
 **Print Schedule** *button*	The Print Schedule button displays a Print Preview window of the agent's schedule for the current week, including all details. Click **Print Schedule** to start the standard Windows print process for the currently displayed schedule.
☐ check boxes	Select the check box in the table's first column for each day for which you want to create trade proposals or add exceptions. Then, click Create Trade Proposals or Add Exception.
Date	Shows each date during the week.

Control	Description
and icons	Click the icon to display the details for this date in a "drop-down" format. Click the icon to hide the details.
Paid hours *for this date*	Shows how many hours of paid work you are scheduled for on each day.
Schedule Details *for this date*	Shows what activities you are scheduled to perform each day. This column also shows break information.
Start Time *for this date*	Shows when you are scheduled to start your shift and the start time for each activity and break during your workday.
End Time *for this date*	Shows when you are scheduled to end your shift and the end time for each activity and break during the workday.

Add Exception Dialog Box

Exceptions define periods of time when you are engaged in non work activities or are absent, such as in training or meetings. Supervisors or managers configure a set of Exceptions that can be used in your site, based on business requirements. To add an exception to your schedule, select day(s) in the schedule, and click the **Add Exception** button. The **Add Exception** dialog box appears, with the following controls:

Control	Description
Exceptions *drop-down list*	Select an exception from this list, if it is configured to appear.
Full Day Exception *check box* (read-only)	If the selected exception is a Full Day exception, this check box is selected. If the selected exception is not a Full Day Exception, this check box is cleared.
Allowed Range:	Your supervisor specifies the start and end dates in this date range. You can specify the exact Start Time and End Time for the exception. (Specify place for exception pane) or specify a range that WFM can use to decide the Start Time and End Time for the exception (Find place for Exception pane). **Note:** Both panes cannot be displayed at the same time.
Specify place for exception *pane*	Click this phrase to expand or minimize this pane, which contains choices that specify a Start Time, End Time, and Paid Time for the exception.
Specify place for exception *fields*	Select or enter hours and minutes values in the drop-down fields **Start Time** and **End Time** of the

Control	Description
	selected exception. The start time must occur before the end time. The hours 12AM ... 12PM represent times in the current day; the times +12AM ... +12PM represent times in the next day. Select or enter hours and minutes values in the drop-down field Paid Time of the selected exception. The check box of each selected weekday is selected by default. You can clear one or more check boxes to exempt the corresponding day(s) from your choices.
Find place for Exception *pane*	Click this phrase to expand or minimize this pane, which contains choices that specify a range of possible Start Times and End Times. WFM will make the actual choices, within this range.
Possible dates *fields*	The **Earliest Start** and **Latest End** fields are for display only; you already selected this range of days before you clicked the Add Exception button.
Possible times *fields*	Select or enter hours and minutes values in the drop-down fields **Earliest Start** and **Latest End**. The start time must occur before the end time. The hours 12AM ... 12PM represent times in the current day; the times +12AM ... +12PM represent times in the next day
Duration	Select or enter hours and minutes values for the drop-down fields.
Possible weekdays	Clear the check box for each weekday that is to be excluded as "possible"; all are selected, by default. **Note:** Weekdays that are selected in the My Schedule view only are available in the Find place for Exception and Specify place for Exception panes.

Warnings Versus Errors

If WFM displays:

- Warnings—The exception is inserted into the schedule as a pending change.
- Errors—The exception is not inserted into the schedule.

Pending Changes

WFM Web for Agents displays changes which are requested but not yet approved in a Pending Changes table, which appears directly below the Agent's schedule. Click the **Undo Changes** link in the leftmost column of any pending change, to cancel your request.

Other Schedules

The Trading message box, which appears near the bottom of the Other Schedules pane, alerts you to any open trade proposals or responses.

Two panes near the top of this window control different views of agent schedules:

- Other Schedules—Displays a filterable, sortable, and searchable grid that lists other agents and their schedules.
- My Schedule—Displays your schedule information for the current week.

The Other Schedules pane lists agents and their schedules (all agents in the Enterprise, if unfiltered). Columns:

Column	Description
Agent	Displays the name of the agent whose information appears in that row. Position the cursor over a day cell to display its details in a pop-up window.
Site	Displays the name of the agent's site and (in parentheses) the site's Business Unit.
Team	Displays the name of the agent's team.
days of the week (*one column for each*)	Displays the agent's schedule information for that weekday.

Click the **Agent**, **Site**, or **Team** column header to sort the grid by the data in that column, in ascending or descending order.

The **Filter** button displays the Filter dialog box, where you can click the corresponding radio button to limit the display to one of these choices: **People I work with** (the default), **My Shared Transport** (displayed if the agent joined any shared transport), **My Team**, **My Site**, **My Business Unit**.

Important

The filtering options that are available to you have been configured by a supervisor or a system administrator.

The **Find An Agent** button displays the **Find an Agent** dialog box, where you can search the grid for, and highlight instances of an agent's first name or last name.

If there is more than one page of data, use the navigation buttons **First**, **Previous**, **Next**, and **Last** to move between the pages. These buttons are grouped with a numeric indicator of your position within the pages: 1 of 1

Trading

The Trading message box, near the bottom of the window, alerts you to any open trade proposals or responses.

The trading windows—if your system administrator has enabled them—help you obtain more convenient schedules by trading with other agents. This help topic first describes the whole trading process (How Trading Works) and then breaks it down into steps (Requirements for a Successful Trade). For step-by-step instructions, see the Trading Windows Road Map.

Using the eight trading windows, you can:

- Create schedule trade proposals.
- Respond to other agents' personal or community trade proposals.
- Review or cancel your own trade proposals.
- Review or cancel your responses to other agents' proposals.
- View other agents' schedules or schedule details.

How Trading Works

A trade can include up to one full week of schedule days. Every schedule trade requires:

- One agent's proposal for a trade. The proposal specifies which schedule days this agent wants to trade.
- Another agent's response to that proposal. The response indicates this agent's willingness to accept the proposed trade.
- An approval. The approval can be either automatic (by WFM Web) or explicit (by a supervisor).

For some trades, the proposing agent must explicitly accept the response before submitting the trade for approval. This is always true for community proposals, which are offered to all agents within a team or site.

If a trade is approved, it executes: both agents' schedules change to reflect it, and the trade no longer appears in most trading windows. (However, all of your own proposals still appear on the My Proposals tab even after WFM Web executes the corresponding trades.)

Not all trades are approved. Under certain conditions (for example, when one agent is not qualified for the other's scheduled activities), WFM Web automatically declines a trade. If either agent's schedule is changed before a pending trade's approval, WFM Web automatically cancels the trade. If a pending trade has not been approved before the first day involved in the trade, it expires. In each of these cases, the trade does not occur

Requirements for a Successful Trade

For a trade to take place, all the following steps must occur.

- One agent creates a community or personal trade proposal.
- At least one agent responds to the community proposal or the receiving agent accepts the personal proposal.
- The proposing agent accepts a response to a community or personal proposal. (This step is required for personal proposals only if the proposing agent specified manual approval.)
- The trade receives either WFM Web's automatic approval or a supervisor's explicit approval.

Trading Windows Road Map

The eight Trading windows enable you to propose schedule trades, accept or decline other agents' trading proposals, and cancel your proposals or responses. See the sections below for how to:

- Open the trading windows
- Move between trading windows
- Use the trading windows' common features.

Opening the Trading Windows

To open the trading windows from other windows, click Trading on the Menu Bar.

- If you have unanswered personal trade proposals for the currently selected week, the Personal Proposals window opens.
- If you have no unanswered personal trade proposals for the currently selected week, the My Proposals window opens.

Moving Between Trading Windows

Most trading windows include the Trading menu bar. Click tabs on the bar to move among the trading windows.

Each trading window shows a particular kind of information about trade proposals, responses, or underlying schedules. The eight trading windows are:

Trading window	Description
Personal Proposals	Shows trading proposals that another agent has proposed to you specifically.
Community Proposals	Shows trading proposals that agents have offered to all agents within your team or site.
My Proposals	Shows schedule trades that you have proposed, with their status and any responses. (Responses appear below their associated proposal.)
My Responses	Shows your responses to other agents' trading proposals, with status information.
[Trading] Schedules	If enabled, helps you identify trading partners by showing other agents' scheduled working hours. (If your system administrator has disabled this feature, the Trading menu bar does not include a Schedules tab, and you cannot open this window.)

Trading window	Description
	Agent days displayed with a darker background color are days that are not compatible with you, as the logged in agent. For example, an agent day in a darker background color may indicate a full-day exception that cannot be traded or a day that contains activities in which you are not skilled, which also cannot be traded.
Schedule Details Pop-Up	Clicking an agent name shows that agent's detailed schedule (activities and start/end times.
Create Trade Proposals	Allows you to initiate a trading proposal. Click create trade proposals in the Schedule Window to open this window.
Trading Comments	If your system administrator has enabled WFM for Agents to support comments, allows you to add explanatory comments to trade proposals and responses. Click the action buttons in the Personal Proposals, Community Proposals, My Proposals, or My Responses windows to open this window.

Trading Windows' Common Features

Most of the trading windows display information for one week at a time, with standard date selectors to move to other weeks. Most windows show up to 10 trades at a time in a table that includes some, or all, of the following columns and controls:

Column/Controls	Description
Re	In the Personal Proposals or Community Proposals window, an asterisk (*) in this column indicates that you have already responded to this trading proposal.
Dates	Shows the start and end dates involved in the trading proposal or response.
Status	In the My Proposals or My Responses window, this column shows the acceptance or approval status of the trading proposal or response.
Agent name	Shows the agent originating or responding to the trading proposal. Click any link in this column to view the corresponding agent's Schedule Details pop-up.
days of the week	These columns show work start/end times for each day in the proposed trade.
Total paid	Shows the total number of paid hours covered by the proposed trade.
Action *buttons*	Provides buttons to accept, decline, or cancel a proposal or response, or to respond to a community proposal.

Column/Controls	Description
Comment	Shows any comments attached to the proposal or response. If the trade needs to be approved by a supervisor, the supervisor can see any comments you enter when you make the trade request. Or the supervisor may enter a comment about the trade for you to read. This column does not appear if your system administrator has disabled the Comments feature.
Previous 10	Click this button to display the previous set of trades (if there are more than 10 trades).
Next 10	Click this button to display the next set of trades (if there are more than 10 trades).

Trading Windows for Specific Tasks

Use the trading windows for:

- Reviewing your proposals and their responses
- Reviewing your responses to other agents' proposals
- Creating trade proposals
- Adding comments to a trade (if enabled)
- Viewing personal proposals available to you
- Viewing community proposals that are available
- Viewing other agents' schedules
- Viewing other agents' schedule details

For instructions about how to move among the trading windows and using their common features, see the Trading Windows Road Map. For a description of how trading works, see the Trading Overview.

Reviewing My Proposals and Their Responses

Use the My Proposals window to:

- Review schedule trades that you have proposed, along with their status and any responses.
- Accept or decline responses.
- Cancel your own pending trade proposal, if you change your mind.

The window includes standard date selectors and a table of proposals, whose general controls are described in Trading Windows' Common Features.

About the Proposals Table

The table shows all of your proposals whose first day falls within the selected week. It is sorted by the first date of each proposal.

Responses appear on separate rows below their associated proposals.

- Click an agent's link in the **Agent Name** column if you want to display his or her Schedule Details pop-up.

Viewing and Changing Trade Status

The Status column tells you what the current status is for each trade proposal. Each proposal's (or response's) status determines the actions that you can take in the Action column:

Status	What it means	Actions you can take
Open	The proposal has been offered to a specific agent or to the community, and has not yet passed into one of the other statuses listed in this table.	Click **cancel** if you want to cancel an open proposal.
Accepted	Another agent has accepted your personal proposal or responded to your community proposal.	Click **accept** on a response row to submit this trade (with this response) for approval. Click **decline** if you choose not to trade with this respondent.
In Review	Another agent has accepted your proposal and, if required, you have approved the response. But	Click **cancel** if you want to cancel your original proposal.

Status	What it means	Actions you can take
	the trade could not be auto-approved. It is now awaiting a supervisor's approval.	This will also cancel the response.
Confirmed	Both you and the other agent accepted the proposal, and the trade received either automatic or supervisor approval. Your trade has executed.	None
Declined	The proposal was declined by the responding agent (in the case of a personal proposal), by a supervisor, or by WFM Web. The trade will not take place.	None
Cancelled	Either you explicitly cancelled your proposal, or WFM Web automatically cancelled the pending trade (because of changes to your schedule or the responding agent's schedule). The trade will not take place.	None
Expired	The proposal did not receive approval by the day before its first included day. The trade will not take place.	None

When you click the accept, decline, or cancel button, the Trading Comments window opens. There, you can add a comment and complete the action by clicking submit.

For further details about requirements for a trade's approval, see Trading Overview.

Reviewing My Responses to Other Agents' Proposals

Use the My Responses window to:

- Review your responses to other agents' schedule trade proposals.
- Review the status of proposals to which you have responded.
- Cancel a pending response, if you change your mind.

The window includes standard date selectors and a table of proposals and responses, whose general controls are described in Trading Windows' Common Features.

About the Proposals and Responses Table

The table shows all of your responses to proposals whose first date is within the selected week. It is sorted by the first date of each proposal.

The Agent Name column shows the agent who posted each original proposal.

- Click an agent's link in the **Agent Name** column if you want to display his or her Schedule Details pop-up.

Viewing Trade Status and Canceling Responses

The Status column tells you the current status of each trade proposal/response pair. When a response is in certain statuses, you can use the Action column to cancel it:

Status:	What it means:	Actions you can take:
Accepted	You have accepted this personal proposal or responded to this community proposal. Your response is now awaiting the proposing agent's decision.	Click cancel if you want to cancel your response.
In Review	You accepted this proposal and, if required, the proposing agent approved your response. But the trade could not be auto-approved. It is awaiting a supervisor's approval.	Click cancel if you want to cancel your response.
Confirmed	Both you and the proposing agent accepted the proposal, and	None

Status:	What it means:	Actions you can take:
	the trade received either automatic or supervisor approval. Your trade has executed.	
Declined	Your response was declined, either by the proposing agent or by a supervisor. The trade will not take place.	None
Cancelled	Your response was cancelled: you explicitly cancelled it, or the other agent cancelled the original proposal, or WFM Web automatically cancelled the trade because of changes to either agent's schedule. The trade will not take place.	None
Expired	The proposal did not receive approval by the day before its first included day. The trade will not take place.	None

When you cancel a response, if your system administrator has enabled the Comments feature, the Trading Comments window opens. There, you can add a comment and complete the action by clicking submit.

For further details about requirements for a trade's approval, see Trading Overview.

Creating Trade Proposals

Use the Create Trade Proposals window to propose a schedule trade:

1. In the first column of the Schedule view, select the check boxes beside the schedule days that you want to trade. Then click **create trade proposals**.
   The Create Trade Proposals window opens. Its first line lists the date(s) that you just selected.
   Some types of exceptions do not appear by name. Instead they are marked by the generic label Exception. These exceptions have been configured by the system administrator to be nontradeable.

2. Select either **This trade proposal is for an individual** or **This trade proposal is for the community**.
   The community option includes agents on your team or agents at your site, depending on how your system administrator has set up WFM Web.

3. If you choose the individual option, select the agent's name from the drop-down list.
   The list includes agents on your team or at your site, depending on how your system administrator has set up WFM Web
   If you choose the community option, you cannot select individual names here.

4. If you choose the individual option, you can also select **Check if you want to manually approve response to this trade proposal**.
   Selecting this check box means that for the trade to take place, you must explicitly confirm the other agent's acceptance of this proposal.
   Clearing the box means that once the other agent accepts it, the trade will immediately be submitted for approval, without your intervention.
   If you choose the community option, you cannot clear this check box. You must confirm (accept) one response to submit the trade for approval.

5. Optionally, enter comments about this proposal in the large text box near the bottom. You can only enter comments if your system administrator has enabled the Comments feature.

6. Click **Submit** to send the proposal, or **Cancel** to delete it without sending it.

Adding Comments to a Trade

Important

You can only add comments to a trade if your system administrator has enabled this feature.

Use the Trading Comments window to add comments (if you want) and then complete one of the following actions that you have begun in another window:

- Accept, decline, cancel, or respond to a trade proposal.
- Accept, decline, or cancel a response.

The Trading Comments window's heading text indicates the action that you are about to complete.

1. Type your comments into the Comments text box.

   For example, you might want to indicate your reason for declining or canceling a proposal or response.

2. Click **Submit** to attach your comments and complete the action. (Or click **Cancel** to discard your comments and cancel the action.)

   The window that opens after you click Submit depends on what trading action you are completing:

Action completed	Resulting window
Accept Proposal, Respond to Proposal, or Cancel Response:	Opens the My Responses window.
Decline Proposal or Cancel Own Proposal:	Returns you to the previous window.
Accept Response or Decline Response:	Opens the My Proposals window.

Viewing Personal Proposals Available to Me

Use the Personal Proposals window to examine, and respond to, trading proposals that another agent has sent specifically to you. The window includes standard date selectors and a table of proposals and/or responses, whose general controls are described in Trading Windows' Common Features.

About the Proposals and Responses Table

The table is sorted by Agent Name. It shows only proposals whose status is **Open** they have not expired, are not in review, and have not been accepted, confirmed, declined, or cancelled.

The table provides the following details:

- In the first (Re) column, an asterisk (*) indicates that you have already responded to the trading proposal on this row.
- In the Agent Name column, you can click to display an originating agent's Schedule Details pop-up.

How to Accept or Decline a Proposal

In the Action column:

- Click  **accept** if you want to trade schedules.
- Click  **decline** if you do not want to trade.

The Trading Comments window opens, in which you can add a comment and submit your response.

Viewing Community Proposals

Use the Community Proposals window to examine, and respond to, schedule trade proposals offered to all agents. Depending on WFM Web's setup at your site, community proposals can be offered to all agents on your team or to all agents on all teams.

The window includes standard date selectors and a table of proposals, whose general controls are described in Trading Windows' Common Features.

Viewing Your Schedule Information

The first row of the Community Proposals view always displays your schedule information, against a differently colored background. Click on your name to view your schedule details for selected week in a pop-up window.

About the Proposals Table

The table is sorted by Agent Name. It shows only proposals whose status is **Open** they have not expired, are not in review, and have not been accepted, confirmed, declined, or cancelled.

The table includes the following details:

- In the first (Re) column, an asterisk (*) indicates that you have already responded to the trading proposal on this row.
- In the Agent Name column, you can click to display an originating agent's Schedule Details pop-up.

How to Respond to a Proposal

- In the Action column, click  **respond** if you want to trade schedules.

  The Trading Comments window opens, in which you can add a comment and submit your response.

Viewing Other Agents' Schedules

Use the [Trading] Schedules window to examine other agents' schedules. This can help you identify agents with whom you want to trade schedules.

> **Important**
> You can open this window only if your system administrator has enabled it. A second setup option determines whether you can view schedules only within your own team or across all teams at your site.

About the Schedules Window

The table shows schedule information for up to 20 agents at a time, on each day of the displayed week. Agent days displayed with a darker background color are days that are not compatible with you as the logged in agent. For example, an agent day in a darker background color may indicate a full-day exception that cannot be traded or a day that contains activities in which you are not skilled, which also cannot be traded.

The table includes the following columns:

Agent Name	Click an agent's name if you want to open the Schedule Details pop-up, which shows you details about the agent's scheduled activities on each day. Click the arrow symbol next to the column title, to sort the table by this column's data.
Team	Displays the team to which the Agent belongs. Click the arrow symbol next to the column title, to sort the table by this column's data.
days of the week	These columns show one of the following for each agent on each day: a shift, working hours, Day Off, Time Off, or an exception name.
Total paid	Shows each agent's total paid hours for the week.

> **Important**
> Some types of exceptions do not appear by name. Instead they are marked by the generic label Exception. These exceptions have been configured by the system administrator to be nontradeable.

Using the Schedules Window

You can modify the display using the following options:

- To reveal any days that are hidden offscreen, use the horizontal scroll bar at the bottom of the window.
- To reveal more agents, click **Previous 20** or **Next 20**.
- To display a different week, use the date selectors at the upper right.

Viewing Other Agents' Schedule Details

Use the Schedule Details pop-up window to help identify agents with whom you want to trade schedules. It displays details about another agent's scheduled activities, with start and end times, on each day of the selected week.

About the Schedule Details Pop-Up

The pop-up window displays schedule details for the agent and week identified along the top. The table contains the following columns:

Column	Description
Date	Each day of the selected week appears on a separate row.
Paid hours	The agent's paid hours for this date.
Scheduled activities	Names of the schedule items for this agent on this date.
Scheduled Attendance: Start time, End time	Shows the agent's scheduled start and end time for the listed activities.

Important

Some types of exceptions do not appear by name. Instead they are marked by the generic label Exception. These exceptions have been configured by the system administrator to be nontradeable.

Using the Schedule Details Pop-Up

- If some information is hidden offscreen, use the scroll bar along the right edge to reveal it.
- To close the pop-up window, click its close box in the upper right corner.
- To display a different week, first close this pop-up to restore the previous window. Then change the date in that window, and click the same agent's link in that week's display.

Preferences and Patterns

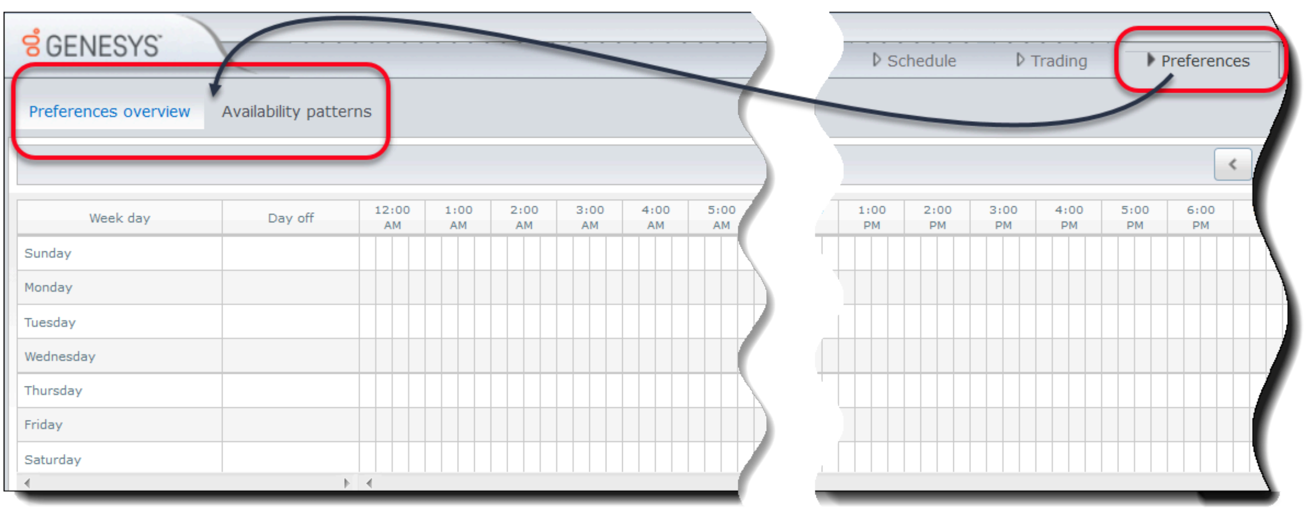
The Workforce Management (WFM) *Preferences* feature enables you to set preferences for your availability, shifts, and days off. Use preferences to let your supervisor know when you prefer to work and what days you prefer to have off. Supervisors can then take your preferences into consideration when building schedules.

Decide which type of preference you want to create. If you choose availability preferences, ask yourself if you would reuse these preferences—for example, for multiple weeks in a row. If the answer is yes, use availability patterns to create a preferences *template* that you can reuse any time, and as many times as you like.

You create patterns for availability preferences only (not shifts or days off).

> **Tip**
> If you do not see Preferences in the menu bar, they are not enabled in your contact center.

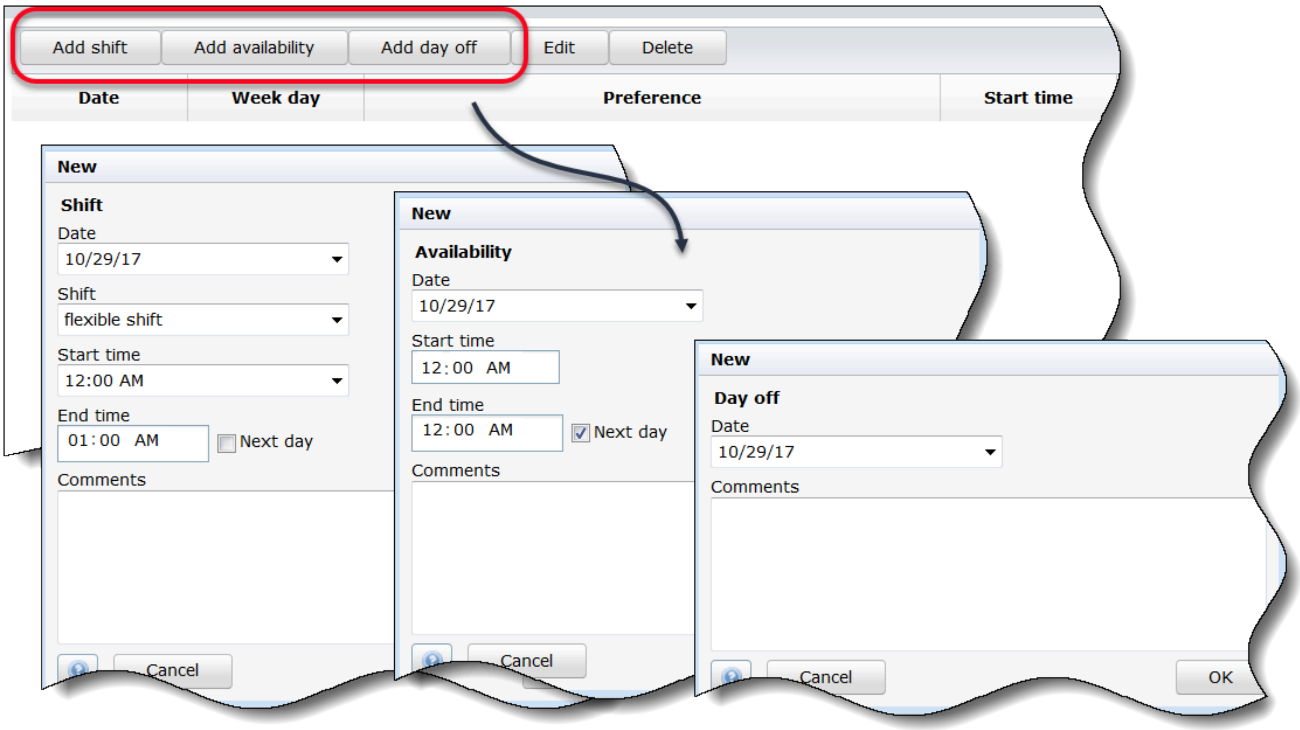
Making your preferences known



Availability preferences and *availability patterns* are similar, in that you can use either one to let your supervisor know when you are available for work. Adding availability preferences is usually a *one-of* entry—meaning it's only applicable once, for the dates you specify. You can add more than one availability preference, but they are individual entries and do not establish a pattern for a specific time period. For that, you will use availability patterns.

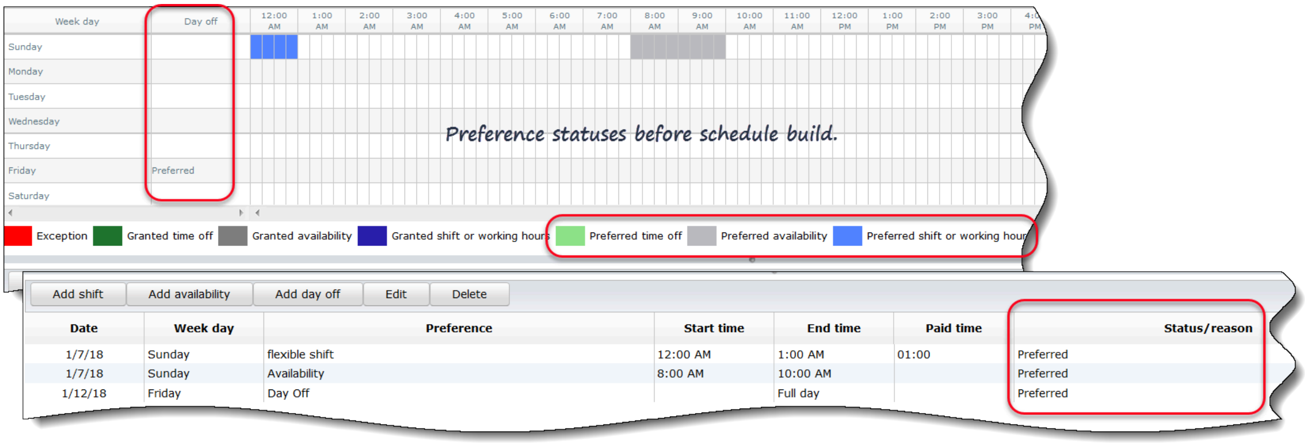
Use the **Preferences** > **Preferences Overview** tab to enter your preferred availability, shifts, or days off.

Managing your preferences



Use the buttons in the bottom half of the **Preferences Overview** tab to manage your preferences and monitor their statuses. Adding availability, shift, and day off preferences is straightforward, as is editing and deleting preferences.

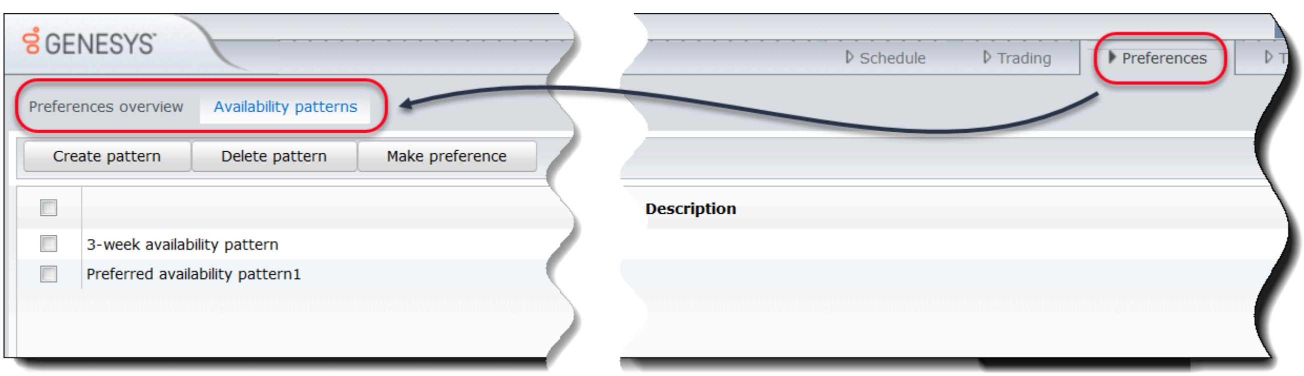
Understanding the status hierarchy



Your preferences will have different statuses before and after your supervisor builds the schedule. Some preferences have priority over others and those preferences are processed and granted before other lower-priority preferences. See the order or hierarchy of preferences to understand when you can expect your preferences to be granted.

You can see the preference status in the bottom half of the **Preference Overview** tab.

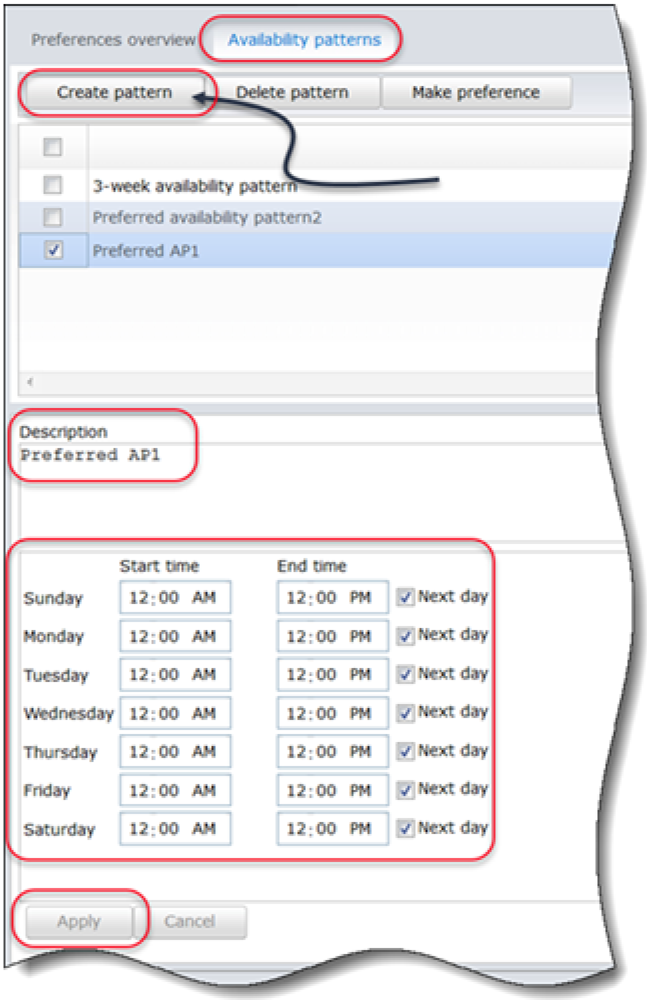
Using patterns to make availability preferences known



Use *availability patterns* to easily set preferences for a range of dates, when your preferences are the same for multiple weeks, or to set a weekly pattern that you can reuse at any time.

For example, you might want to create an availability pattern to let your supervisor know that you are available (and prefer) to work between the hours of 7:30 am and 9:30 am on Tues, Wednesday, and Thursdays for the next three weeks. Unless you create a pattern, you will have to enter your availability for each day separately (even though your availability is the same for all three weeks).

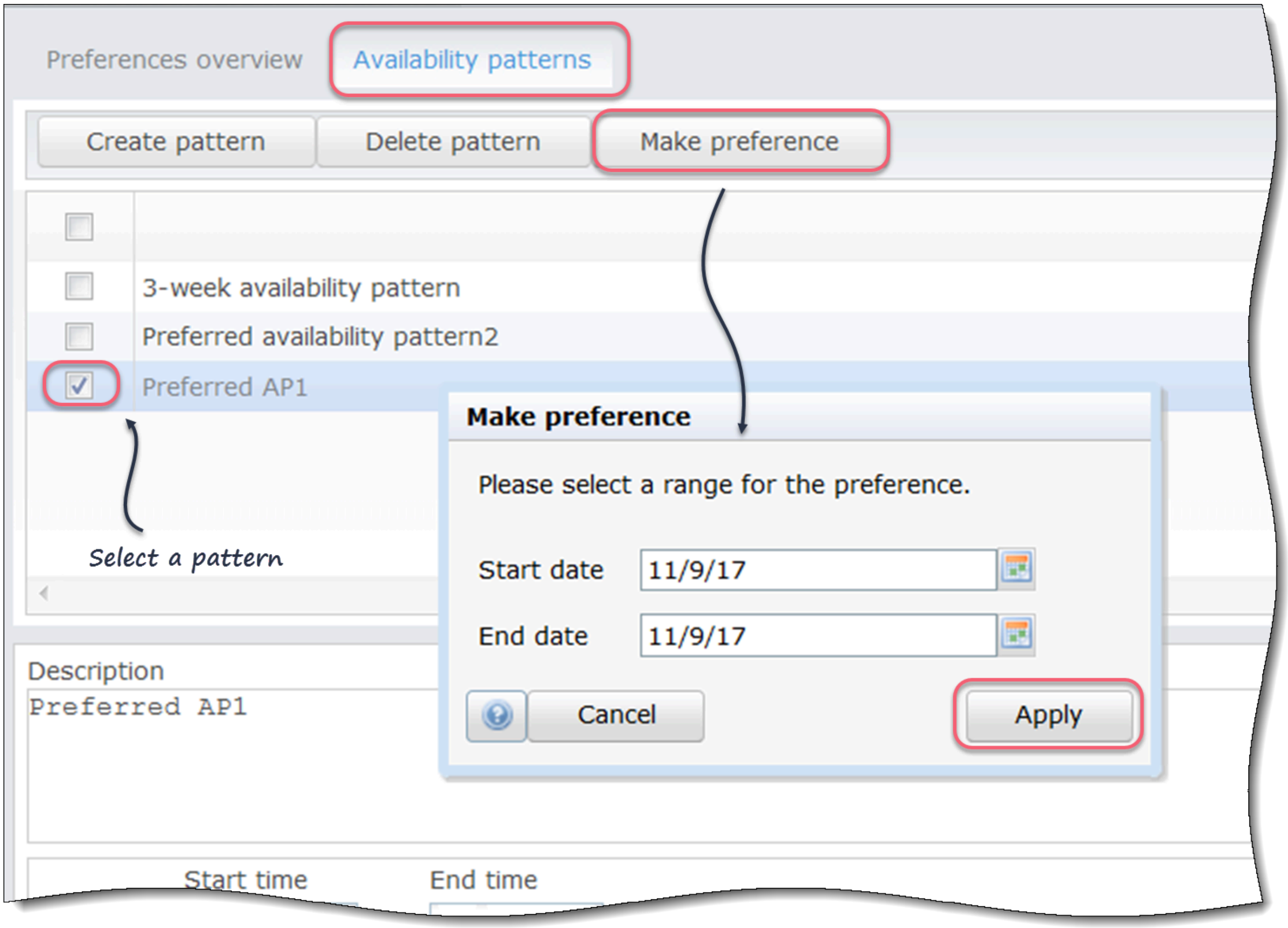
1. Create the pattern



Using patterns to add availability preferences is a two-step process. First you create the availability pattern and then, you use the pattern to add your preferences.

Use the **Preferences** > **Availability Patterns** tab to create weekly patterns. You can then, use these patterns to set your availability preferences for a specific date range.

2. Use the pattern to make preferences



After creating a pattern, you can reuse it to set availability preferences at any time. It's a great way to let your supervisor know, in advance, when you are available for work outside of your scheduled shift.

Preferences

First, find out why you would use Preferences. See Preferences and Patterns.

The Preferences window displays two tabs, Preferences Overview (the default) and Availability Patterns. Use the **Preferences Overview** tab (click the title) to:

- View your preferences for shifts, exceptions, days off, working hours, time off, and availability.
- Add, modify, or delete your preferences for shifts, your availability or days off.
- Enter comments associated with your preferences.

> **Important**
> You cannot edit or delete exceptions, time off, working hours, or granted preferences. If you need to change an exception or a granted preference, contact your supervisor.

Viewing Preferences or Exceptions

Each day's bar in the Preference Overview pane's Weekly Preferences grid shows preferences and exceptions as segments covering the preference or exception timesteps. The Legend indicates which colors represent exception and preference statuses.

In the Weekly Preferences grid, you can view the status of each day off, for which you made a Day Off preference. Most cells in the Day Off column will be empty, except the actual days for which you created a preference. In those cells, one of three Day Off statuses will appear: Scheduled, Preferred, or Granted.

Use the Availability Patterns pane (click the title) to:

- Create, modify, or delete availability patterns.
- Create availability preferences based on availability patterns.

The **Preferences Overview** pane has three main sections:

TOP—Preferences Overview link and Availability Patterns link on the left side, Weekly Preferences Grid beneath them and across the full width of the display.

MIDDLE—A Legend identifies the colors used in the Weekly Preferences Grid.

BOTTOM—The Daily Preferences table summarizes your preferences and preference status on each day. It contains a row for each week day and the following columns:

Column	Description
Date	The date of the indicated day.
Weekday	The day of the week.
Preference	The names of the preferences and exceptions for each day.
Start time	When each preference or exception is requested to begin. (For a Day Off, this column is empty.)
End time	When each preference or exception is requested to end. (For a Day Off, this column displays "Full Day".)
Paid time	The number of paid hours in each preference or exception.
Status/Reason	Status: whether each preference is Preferred, Granted, Declined, Scheduled, or Not Scheduled. See Preference Statuses and Hierarchy for an explanation of these statuses. Reason: Why WFM assigned a status such as Declined or Not Scheduled to the time-off item.
Comments/Memo	If any item shown in this list has a comment/memo associated with it, the comment/memo appears in this column.

Preference Statuses and Hierarchy

Before scheduling, a preference can be Granted, Declined, or Preferred. After a scheduled is built for the dates that include this preference, the status can be Scheduled (appears in the schedule) or Not Scheduled (does not appear in the schedule).

- A **Granted** preference appears in the schedule unless it is first removed or unless another preference is added that out-ranks the first one. If this happens, the status of the lower-ranking preference changes to Declined.
- A **Declined** preference does not appear in the schedule unless it is declined in favor of a higher-ranking preference and the higher-ranking preference is later removed before the schedule is built. If this happens the preference goes back to its original status, which can be Granted or Preferred.
- A **Preferred** preference appears in the schedule if it complies with the scheduling constraints and optimization settings that are configured for your site.

Hierarchy of Preferences

1. Granted full-day exceptions.
2. Granted days off.
3. Granted full-day time off.
4. Granted availability.

5. Granted shifts.
6. Granted paid (working) hours.
7. Granted part-day exceptions, granted part-day time off.
8. Rotating patterns.
9. Preferred items (including exceptions, paid hours, and time off with preferred status).

> **Important**
> If you do not see Preferences in the menu bar, then Schedule Preferences are not enabled for your contact center.

Graphical Hierarchy

The graphical hierarchy differs from the status resolution hierarchy. The Preferences graph displays the following hierarchy, top to bottom:

- Full day Exception
- Time off
- Availability
- Part day exception
- Shift
- Working hours

Granted or Scheduled items are shown on top and Preferred items (of the same type) are shown below them.

Editing and Deleting Preferences

Use the following procedures to edit or delete a preference from the Weekly Preferences grid or Daily Preference list in the **Preferences Overview** pane.

When editing preferences, take note of the following:

- When editing preferences, you cannot change the date.
- If WFM can schedule your preference, the revised preference appears in the Preferences window.
- If an Availability preference cannot be edited, a warning is displayed after the **Edit** dialog closes and the preference remains unchanged.
- If a Shift preference cannot be edited, a warning is displayed and the **Edit** dialog stays open, enabling you to change the data.

- Available shift start times can differ, if a time zone, other than site time zone, is selected.
- When adding a shift to your preferences, you will see fewer available start times or possibly no applicable start times, depending on the time zone you selected. In this case, select either the site time zone or try another time zone.
- Your preferences are not guaranteed to be assigned to you unless your supervisor grants them prior to scheduling. If your preferences are not granted, WFM schedules as many preferences as possible according to the rules configured for your site.

Editing Preferences

To edit a preference in the Preferences Overview pane:

1. Click the preference you want to edit.
2. Click **Edit**.
3. When the dialog window opens, make the appropriate changes and click **OK** to submit the entry, or **Cancel** to discard it and close the dialog window.

Deleting Preferences

To delete a preference, select the preference you want to delete and click **Delete**.

Adding and Editing Shift Preferences

First, find out why you would use Preferences. See Preferences and Patterns.

Use the **Preferences Overview** pane to add your shift preferences:

1. Click **Add Shift**.
2. In the **Date** drop-down menu, select a date.
3. In the **Shifts** drop-down menu, select a shift.
4. Select a **Start Time** and **End Time** and check **Next Day**, if applicable.
5. In the **Comments** field, enter any applicable comments.
6. Click **OK** to submit the entry, or **Cancel** to discard it and close the dialog window.

> **Important**
> When adding a shift to your preferences, you will see fewer available start times or possibly no applicable start times, depending on the time zone you selected. In this case, select either the site time zone or try another time zone.

Editing Shift Preferences

Use the Preferences Overview pane to edit Shift preferences. See Editing and Deleting Preferences.

Adding and Editing Availability Preferences

First, find out why you would use Availability Preferences. See Preferences and Patterns.

Use the **Preferences Overview** pane to add your availability preferences:

1. Click **Add Availability**.
2. In the **Date** drop-down menu, select a date.
3. Enter a **Start Time**, **End Time**, and check **Next Day**, if applicable.
4. In the **Comments** field, enter any applicable comments.
5. Click **OK** to submit the entry, or **Cancel** to discard it and close the window.

Editing Availability Preferences

Use the Preferences Overview pane to edit availability preferences. See Editing and Deleting Preferences.

Adding and Editing Day Off Preferences

First, find out why you would use Preferences. See Preferences and Patterns.

Use the **Preferences Overview** pane to add your Day Off preferences:

1. Click **Add Day Off**.
2. In the **Date** drop-down menu, select a date.
3. In the **Comments** field, enter any applicable comments.
4. Click **OK** to submit the entry, or **Cancel** to discard it and close the window.

Editing Day Off Preferences

Use the **Preferences Overview** pane to edit Day Off preferences. See Editing and Deleting Preferences.

Availability Patterns

First, find out why you would use Availability Patterns. See Preferences and Patterns.

You can request availability preferences by creating *availability patterns*, which contain the start and end times you want for a week. Availability patterns are displayed in a table at the top of the Preferences pane. Your availability patterns can specify different start and end times for each day.

> **Tip**
>
> When adding or editing preferences, you can select your preferred time zone. When you create availability preferences, the time zone you chose is applied to the start and end times that are specified in availability patterns. The start and end time values in the pattern itself will be in the chosen time zone and do not change if the time zone changes.

Use the Availability Patterns tab to:

- Create, edit, or delete an availability pattern.
- Create an availability preference based on an availability pattern.
- Display the Preferences Overview tab by clicking that link.

Creating Availability Patterns

To create a new availability pattern:

1. In the Preferences window, click **Availability Patterns**.
   The Availability Patterns tab appears.
2. Click **Create Pattern**.
3. Enter a name for the new pattern in the Description text box.
4. Enter start times and end times that you want for each day of the week. On each day's row, use the time controls to enter start and end times (in hours and minutes).

   > **Tip**
   >
   > You can not leave start and end times blank.

   Times are displayed in 12- or 24-hour format, depending on your computer's regional settings. Use the **Next Day** check box to indicate that the end time falls within the next day.

5. After you have entered the information, click **Apply**.
   The new pattern is now included in the Select pattern drop-down list.

Editing Availability Patterns

To edit a previously created availability pattern:

1. In the Availability Patterns tab, select the pattern from the Select pattern drop-down list.
   The pattern properties appear in the start time and end time drop-down lists.
2. Change the start times and end times.
3. Click **Apply**.

Deleting Availability Patterns

To permanently remove an availability pattern:

1. In the Availability Patterns tab, select the pattern from the table by checking the corresponding check box.
2. Click **Delete Pattern**.

Creating Availability Preferences

To create an availability preference based on an availability pattern, see Using Patterns for Availability Preferences.

Using Patterns for Availability Preferences

First, find out why you would use patterns for availability preferences. See Preferences and Patterns.

You can create, edit, or delete availability preferences, as described in this help topic.

> **Important**
> You cannot edit or delete a Granted availability preference.

Creating Availability Preferences

You can create (add) availability preferences in two ways:

1. Use the Preferences Overview pane to enter preferences one day at a time.
2. Use an availability pattern, which allows you to specify availability for a range of days at once.

Creating Availability Preferences Using Patterns

To create an availability preference using an availability pattern:

1. In the Preferences window, click **Availability Patterns**.
   The Availability Patterns tab appears.
2. At the top left, select the pattern that you want to use to create the preference.
3. Click **Make Preference**.
   The Make Preferences window opens.
4. Enter your preference **Start Date** and **End Date**.
5. Click **Apply**.

Using the Edit Weekly Preferences Window

To create an availability preference using the Edit Weekly Preferences Window, follow the instructions in Adding and Editing Availability Preferences. When you create the preference, select the

Availability check box.

Editing Availability Preferences

To edit availability preferences:

- Use the Preferences Overview pane to edit preferences one day at a time. See Editing and Deleting Preferences.
- Use an the Availability Patterns pane to edit availability for a range of days at once. See Editing Availability Patterns.

Deleting Availability Preferences

Use the Preferences Overview pane to delete preferences one day at a time. See Editing and Deleting Preferences.

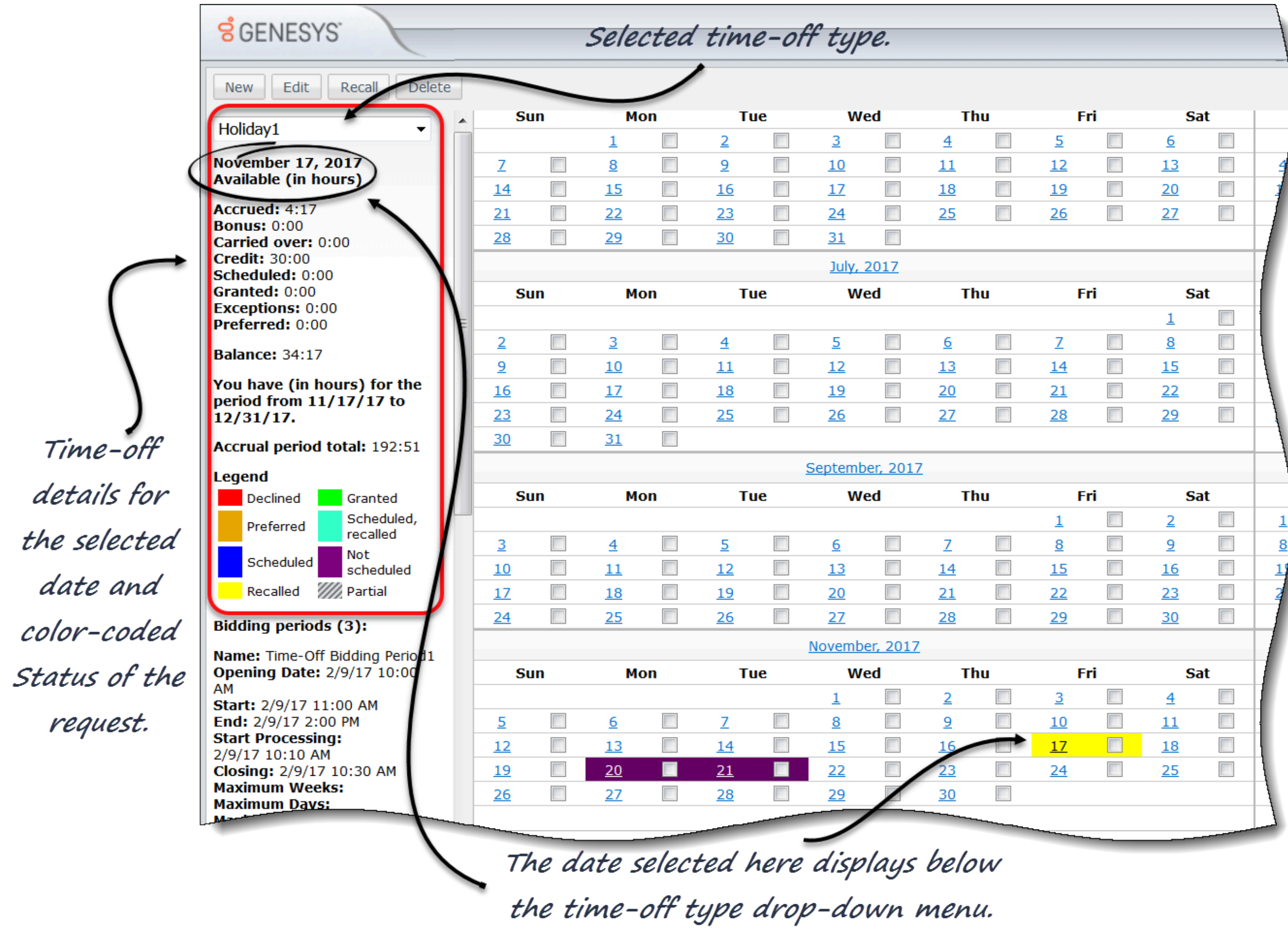
Time Off

The **Time Off** view provides everything you need to manage your time-off requests. Clicking **Time Off** in the Menu bar (or top rail) opens a 12-month calendar for the current year and in the left-most pane, details about time-off types and time-off bidding periods.

Tip

If you do not see **Time Off** in the Menu bar, then the Time-Off Planner is not enabled for your contact center.

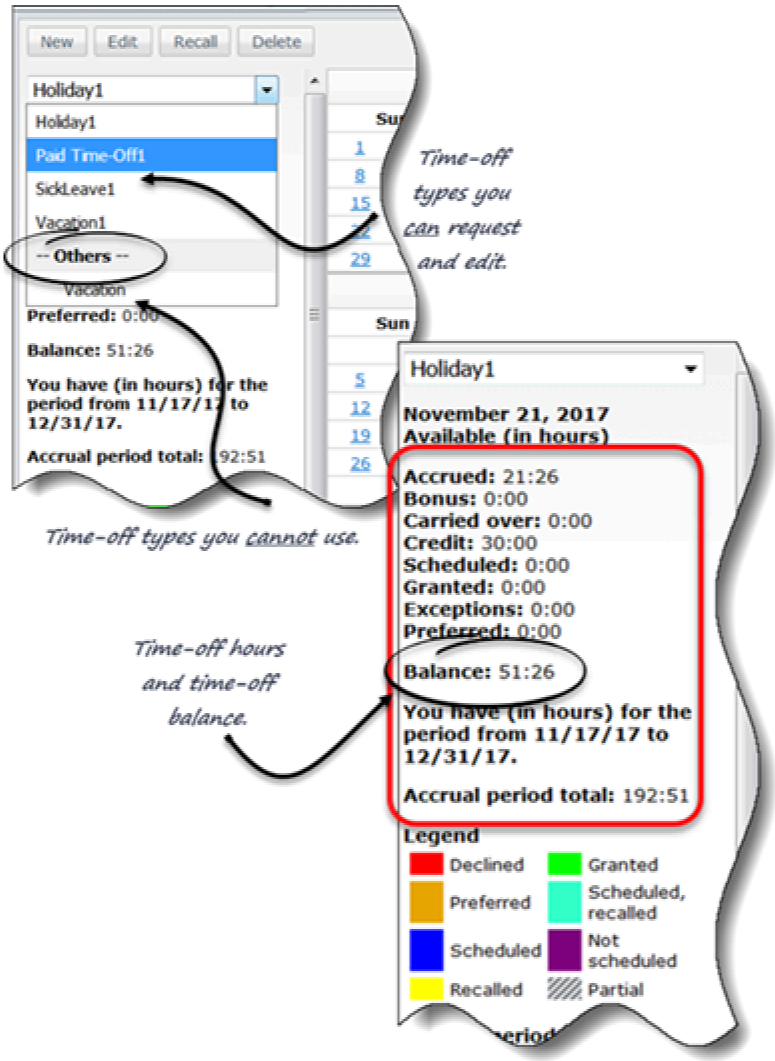
Viewing your time-off in the calendar



Using the calendar, you can view selected time-off types and their details, including the status of your requests, for specific dates. Use the drop-down list to select the time-off type and the **Legend** to understand the color-coded statuses.

You'll notice that each date in the calendar is underlined. Click on any date and it appears under the Time-off type drop-down list, displaying the time-off details for that date.

Viewing your time-off balance



Use the calendar to view your time-off balance for specific time-off types and dates. Your time-off balance is the combined total of several types of time-off such as, accrued, carried over, bonus, scheduled, granted, credited, exceptions, preferred. The number of time-off hours accumulated for each is shown in the details when you select a time-off type. They are described in detail in Time-Off Hours.

Also shown, is the Accrual Period Total, which is the total number of hours accrued for the period specified just above it in the details section. A *period* is defined as a time interval or *period of time*.

The list of time-off types is divided into two parts—The time-off types above **--Others--** and the types below it. You can request and edit only the types above it. The types below are no longer applicable to you.

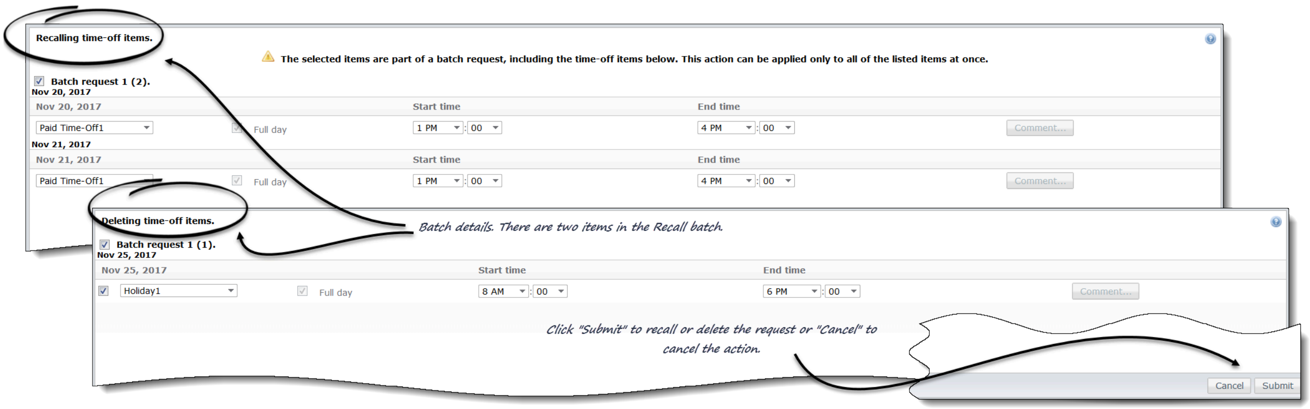
Managing your time off

You manage your time-off requests, by using the four command buttons (New, Edit, Recall, and Delete) in the top-left corner of the **Time Off** pane.

Selecting one or more dates in the calendar and clicking any one of these buttons opens the appropriate view (inserting, editing, recalling, deleting time-off requests) where you will:

- Set the start and end times for your requests.
- Indicate whether your request is for a full or part day.
- Make changes to them.
- Add comments.
- Submit or cancel your requests.
- Recall or delete existing requests (not yet granted or scheduled).

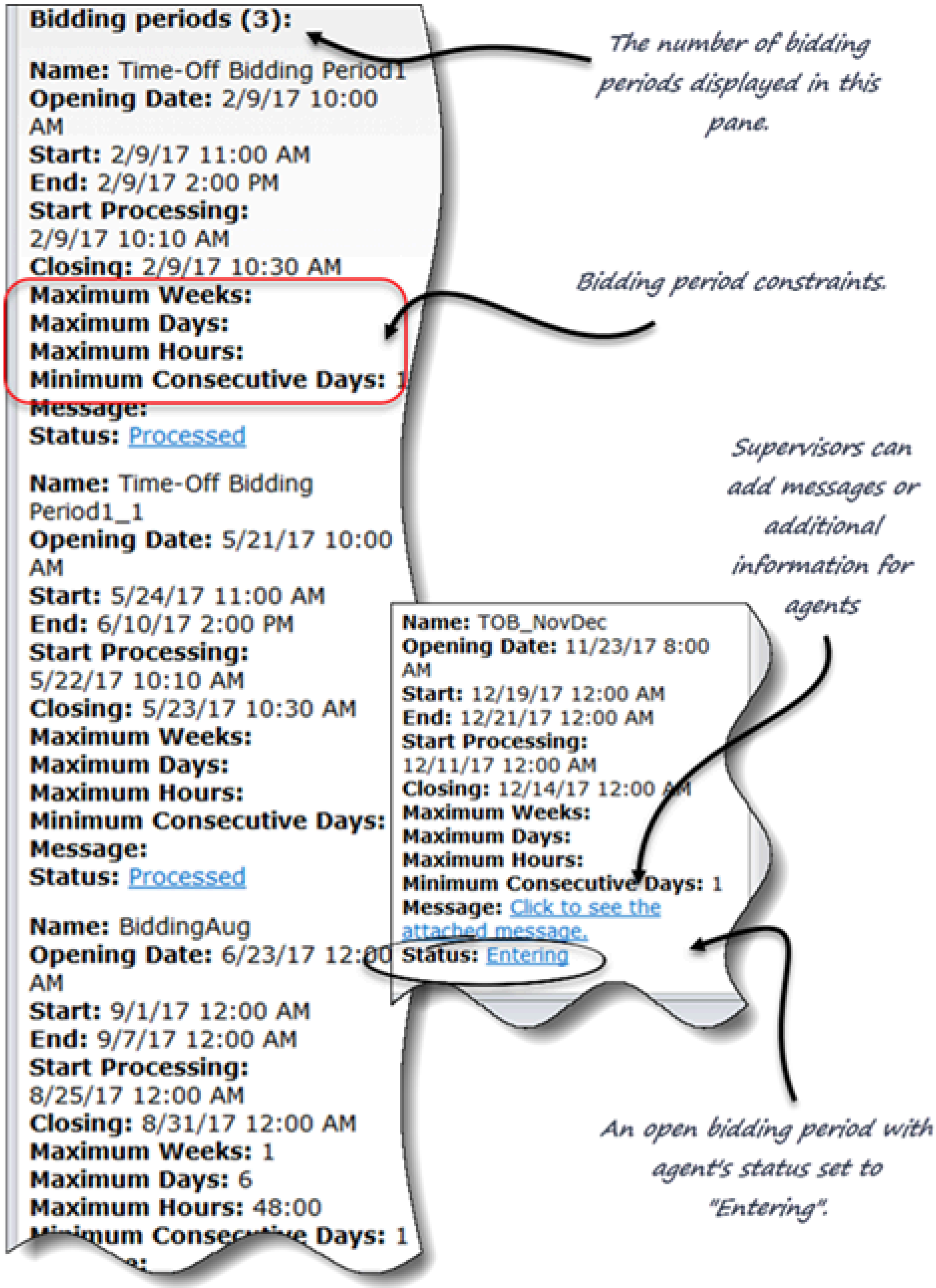
The grid in the upper section of new and edited requests shows the entire day, divided into 15-minute timesteps. To find out if there are time-off limits or if your request is wait-listed, hover your cursor over any timestep to see this information in a pop-up dialog.



You won't see the Time-Off Limits grid when you are recalling or deleting your requests. You'll see only the time-off request details and, if the request is part of a batch, the batch details.

WFM processes each request as a batch. A request you submit for multiple dates is considered 1 batch containing multiple items. Therefore, when you recall any time-off item in a batch, WFM performs the action on all items submitted in that batch. You can only select or deselect items from the same batch together, not separately.

Viewing time-off bidding periods



In some contact centers agents can bid for time-off (it's sometimes called "vacation bidding"). Supervisors create bidding periods with certain rules or constraints that occur or are *open* for a period of time. You and your teammates can see the bidding period details in the left-side pane in the **Time-Off** view.

There might be more than one bidding period open or being processed at the same time, as bidding periods can overlap.

You can bid for time off between the **Opening** and **Closing Date** for the bidding period. To enter a time-off bid, you create and submit a time-off request. After you've done so, click the **Status** link to change your status from **Entering** to **Ready**. This lets your supervisor know your request is ready for processing.

You might see other statuses in the bidding details that you didn't add and cannot change. Your supervisor can set your status to **Entering**, **Ready**, or **Skipped**. WFM automatically sets other statuses at various stages of processing, such as **Waiting**, **Processed**, and **Timed Out**.

For more information about how your requests are processed within bidding periods, see Submitting Time-Off Bids.

Tip

If you do not see Bidding Periods details in the left-side pane, either there are no open bidding periods or Time-Off Bidding is not enabled in your contact center. Also, time-off bidding is different from schedule bidding. To enter bids for schedules, use the Bidding view.

Time Off Pane

The Time Off pane includes two main sections:

1. The balance pane shows your time-off balance for the type of time off that you select in the drop-down list in the upper left corner of the Time Off window. The legend describes what each color represents.
2. The calendar shows time-off requests and their status. Days for which you have time-off requests are shown in color. This color changes depending of the status of the request.

If time-off bidding is permitted in your contact center, you might also see the Bidding Periods section. It contains information about the time-off bidding periods that are applicable within the period displayed in the calendar.

Time Off Calendar

Link to video

Each date in the time-off calendar has a check box next to it, enabling you to complete the following tasks:

- Create time-off requests. See Requesting Time Off.
- Change existing requests. See Editing Time Off Requests.
- Recall submitted requests. See Recalling Time Off Requests.
- Delete requests. See Deleting Time Off Requests.

To display the time-off data for a particular day in the calendar, hover the cursor over that day's cell. A pop-up window displays all the time-off data that exists for that day, which can include: Date, Name, Start/End Time, Status, Reason, Comments.

Comments are notes that are entered by a supervisor or manager when the time-off item is either granted or declined.

Reason is an explanation of why a time-off item has a certain status, such as Declined or Not Scheduled.

Balance Pane

To see your balance for a specific time-off type, select the time-off type from the drop-down list at the top left part of the Time Off pane.

Important

The information in the balance pane is for the selected time-off type only. Use the drop-down list box to select a different time-off type, to see your balance for that type. Inside the list box, the time-off types that you can request and edit are listed above the "—*Others*—" legend, and the time-off types that you cannot use are listed below it.

This table explains each category that appears on the balance pane.

Time-Off Hours *section*	Accrued	Total accrued time-off hours for the current period, up to the selected day. (To view the total accrued hours for the entire period, select the last day of the period.)
	Bonus	Total bonus time-off hours. Bonus hours are awarded and configured by your supervisor or scheduling manager and are included in your total time-off balance. Supervisors determine when they are awarded, the number of hours that are awarded, and when they can be used (based on the start and expiration dates). Bonus hours are extracted from time-off balances before accrued time-off hours. If you are unsure of how and when you can use your bonus hours, ask your supervisor or manager.
	Carried Over	Total time-off hours carried over from the previous period. Some companies limit the number of hours that you can carry from one year to the next.
	Credit	Total time-off hours that can be taken in advance, if applicable. Some companies allow you to request more time off than you currently has accrued, with the expectation that you will accrue the necessary time before the end of the year.
	Scheduled	Total scheduled time-off hours for the period, up to the selected day. To view the total scheduled hours for the entire period, select the last day of the period. You

		cannot remove Scheduled or Granted time off in Time Off module, but can remove Preferred time off.
	Granted	Total requested time-off hours that have been granted. To view the total granted hours for the entire period, select the last day of the period.
	Exceptions	Total part-day exceptions used as time-off hours that have been granted.
	Preferred	Total hours of *preferred time off* (requested, but not yet declined, granted or scheduled). To view the total preferred hours for the entire period, select the last day of the period.
	Balance	Total time-off hours for the current period, up to the selected day. The balance is calculated as the sum of accrued, bonus, carried-over, and credit hours, minus granted, preferred, exceptions, and scheduled hours. Note that the limit to this balance can be exceeded. If the limit is reached before the end of the Accrual Period, an agent can progressively accrue more time off if he requests it, and his Supervisor grants it.
	Accrual Period Total	Total hours of time off for which you are eligible in the current period. This value changes only when you select a day in a different time-off period.
	Lead Time (weeks)	If the supervisor has enabled time-off auto-granting, you can enter your time-off preferences at least this number of weeks before the first desired time-off date. Your preferences are granted automatically if your absence would not excessively burden the company, and if you have enough time-off hours available to cover the request. If your supervisor has not enabled auto-granting, Lead Time is not displayed in this section.
Legend	Each status—Declined; Granted; Preferred; Scheduled, Recalled; Scheduled; Not Scheduled; Recalled; and Partial—is represented by its own color. *Partial* indicates a part-day time-off request.	

Important

The Bidding Period section displays only if time-off bidding is permitted in your contact center and there are bidding periods with dates that are within the period displayed in the calendar.

Bidding Periods *section*	Displays all of the bidding periods that are configured for the selected year, but not yet processed.	
	Name:	The name of the bidding period.
	Opening Date:	The opening date and time of the bidding period, and the date on which you can begin to request time off for this bidding period. If you request time off for this bidding period before this date and time, you will receive an error message.
	Start Date:	The date and time that the bidding period starts or opens.
	End Date:	The date and time that the bidding period ends or closes.
	Start Processing:	The date and time that the bidding period requests processing starts.
	Finish Processing:	The date and time that the bidding period requests processing stops.
	Maximum Weeks:	The maximum number of time-off weeks allowed per bidding period.
	Maximum Days:	The maximum number of time-off days allowed per bidding period.
	Maximum Hours:	The maximum number of time-off hours allowed per bidding period.
	Minimum Consecutive Days:	The minimum number of consecutive days allowed per request.
	Message: *link*	When clicked, enables you to view notes or additional information about the bidding period. **Note:** The link is not present if supervisor does not add notes.
	Status: *link*	When clicked, opens a dialog that enables you to change the

		current status of your requests for a specific bidding period. You can choose **Entering** or **Ready**. The dialog also includes the name of the bidding period, the current status, and the date and time when the status was last set. See Statuses in the Bidding Period.

Each date in the calendar is also a link. Click the date link to update the balance pane so that it shows your time-off balance for the date you clicked instead of for the current date. For example, click the date for the day before you would like to take a vacation to see whether you will have accumulated enough time off by then to take your vacation.

Important

- The information you see when click the date link is for the current time-off period. This is the time since the last carry-over date (often January 1), or, if the carry-over date has not yet occurred, the time since your date of hire. The carry-over date might be different for the different types of time off.
- If there are no bidding periods configured for the selected year, the **Bidding Periods** information is not displayed.

Statuses in the Bidding Period

You can have one of the following statuses at various times during bidding period processing:

- **Entering**—This status is automatically assigned to you when the bidding period opens, indicating that you can enter time-off requests that will be processed in the current bidding period.
  You can set this status at any time to indicate that you are changing a time-off request.
  Your supervisor can also set this status.
- **Ready**—You set this status after you submit your time-off requests, indicating that they are ready for processing within the current bidding period.
  Your supervisor can also set this status.
- **Skipped**—This status indicates that bid assignment process should ignore your requests.
  You cannot set this status.
  Your supervisor can set this status at any time.
- **Waiting**—Set when the bid assignment process cannot grant all of your requests, due to limitations set in the time-off rule or time-off limits. The process will wait for you to change your requests or enter new ones. When the waiting period is over or the process finds that you have changed your requests, the process resumes and your requests can be granted.

Set by the bid assignment process; neither you nor your supervisor can set this status.

- **Granted**—Set when all of your requests have been successfully granted.
  Set by the bid assignment process; neither you nor your supervisor can set this status.
- **Timed Out**—Set when the time allotted to allow you to edit or enter time-off requests has expired. At this point, the bid assignment process will move on to the next agent.
  Set by the bid assignment process; neither you nor your supervisor can set this status.

When Time-Off Types No Longer Apply

A drop-down list box in the upper-left corner of your Time-Off Planner displays all the time-off types that are configured for your site. Some of these may not be relevant to you. (Agents are assigned to time-off rules, which in turn are associated with time-off types.)

You can create, edit, delete or recall time-off requests only for time-off types that are assigned to you. Also, you can see "old" time-off types (no longer assigned to you that correspond to time-off rules, but you cannot change them. They appear below the —*Others*— legend in the drop-down list.

The time-off types that you can use appear above the "—*Others*—" legend.

Workforce Management enables you to select a time-off type from below the "—*Others*—" legend in the drop-down list box, but you will not be able to perform any tasks with it (such as requesting time off or viewing your time-off balance).

Time-Off Limits Grid

The Time-Off Limits grid opens when you select dates in Time Off calendar and click **New** or **Edit**.

The grid area displays time-off limit information for the dates that were selected in the main Time-Off Planner view. Each day of the agent's schedule appears in a separate row, divided into timesteps. Dates that are not in sequential order are visually separated by empty narrow rows.

Grid Columns and Controls

Date displays the date and weekday for each row.

Timesteps displays each timestep as a cell in a grid. Point the cursor at a timestep to display the time-off limits for that timestep in a pop-up window.

Full view check box above the grid expands and compresses the display.

- Select this check box (the default setting) to compress the display: each hour in the grid gets a header title.
- Clear this check box to expand the display: each 15-minute timestep gets a header title, and each cell in the grid displays its time-off limit value as an integer rounded downward.

Grid Characteristics

Each cell in the grid presents a color code for the time-off limit of the timestep that it represents:

- **Red**—The time-off limit for this timestep is 0 or less.
- **Green**—The time-off limit for this timestep is 1 or more

Important

If you are deleting or recalling time-off items, the grid and the **Full View** check box do not appear.

Requesting Time Off

Use the Time Off calendar to add a new time-off request, but first, watch the video.

Creating a Time-Off Request

Link to video

To request time off:

1. Select the check box next to each date for which you want to add a time-off request.
   For example, if you want to see an entire month, select all dates in that month.
2. Click **New**.
   The Inserting New Time-Off Items dialog box opens. The Time-Off Limits grid appears at the top of this dialog box. Timesteps that you cannot select in the grid, (because of limits or constraints) are colored red.
3. Select the time-off type from the drop-down list.
4. If this is a request for a full day off, select the **Full Day** check box.
   If you work a different number of hours on different days of the week, you must enter the number of paid hours here, so that the system deducts the appropriate hours from your time-off balance.
5. Specify the exact hours and minutes in your full day by entering or selecting them in the **Paid Time** drop-down list box.
   You must select the Full Day check box and the Paid Time check box.
6. For part-day requests, clear the **Full Day** check box and enter a start and end time for the request.
7. Click **Submit**, or, to discard a request, click **Cancel**.

> **Tip**
> You cannot clear (or select) the check box for a time-off type that you can no longer use. (These time-off types appear below the "—*Others*—" legend in the drop-down list box in the Time Off window.) Also, in step 5 above the **Paid Time** check box is visible only if your systems administrator has configured WFM to enable you to enter paid time for full-day time-off requests.

If WFM successfully processes your requests, the **Time Off** window reappears and displays your new time-off settings. If the server returns error messages, WFM opens a window containing the errors in a list. Click **Close** to return to the main Time Off view.

Important

WFM declines time-off requests that violate the terms of your contract. WFM might also decline requests that fall on a day with a granted day off, granted availability with duration of `0` in the calendar, or a rotating pattern day off. Ask your supervisor about this, if it happens.

See other time-off-related topics:

- Autogranted Time Off
- Bidding for Time Off
- Wait-Listing Notes

Autogranted Time Off

If your supervisor enables autogranting, your time-off requests are immediately granted and published to the Master Schedule under certain conditions:

- The feature is enabled. Consult your supervisor.
- All the requested days come after the specified lead time. The lead time is shown on the balance pane.
- The time-off request is for more hours than the minimum required for the autogrant feature to apply.
- Your absence does not exceed time-off limits established by your supervisor.
- You have accrued enough time-off hours to cover your time-off request.

If the autogrant feature is disabled, your time-off requests are entered in **Preferred** status and a supervisor must grant your requests before they can be included in your schedule.

Some conditions apply to only full-day or part-day time-off requests:

- Full-day time-off requests are always auto-published.
- When a full-day time-off request is recalled, WFM restores a baseline schedule if that is available.
  - If the recalled time off itself is a baseline schedule or if a baseline schedule is not available, then WFM inserts a Day Off if the time off was unpaid.
  - If the recalled time off is paid, then WFM schedules a compatible shift with the same number of paid hours as the recalled time off.
- A part-day time-off request must occur during the hours of your shift.
- If a part-day time-off instance overlaps a part-day exception, WFM preempts and removes the exception (if configured.)
- If a part-day time-off instance overlaps another part-day time off, WFM refuses the request.

Important

- If the time-off instance that you added has the status **Granted, Not Scheduled**, WFM will send a notification to your supervisor.
- When you specify either start/end or paid time in a time-off request, WFM verifies the values against these configured constraints: contract availability, minimum "Earliest Start Time" of all available shifts for the day, maximum "Latest End Time" of all shifts.

Submitting Time-Off Bids

You submit time-off requests for an open bidding period after creating them in the Time Off pane (see Creating a Time-Off Request). WFM does not process the requests immediately, rather it delays granting the requests until the processing start date. On that date WFM grants time-off requests (within bidding period), based on your seniority and/or rank.

After submitting your requests, you will see a dialog informing you that the submitted request falls within the bidding period. If you select **Proceed**, the time-off request is submitted for later processing. If WFM cannot grant some of your requests during bid processing, it allows you a timeout period to change your requests to comply with time-off limits.

In the Time Off view, you will also see a pop-up dialog listing all of days, for which you requested time off. Hover your mouse over a specific day to see the request details, including its status (for example, whether or not the request has been granted). You can do this for any time-off request; not only the time-off requests that fall within a bidding period.

> Tip
>
> Enter new time-off requests or modify existing ones at any time—even after the bid assignment process has started—and your requests will be **preferred wait-listed**. Don't forget to change the bidding status to **Ready**.

Editing Time-Off Items During Bidding

Be aware, when you delete or recall any time-off item in a batch, that WFM performs the action on all of the items that were submitted in that batch, considering it one request. Also, items from the same batch can only be selected or deselected together, not separately.

Time-Off Balances

Time-off requests that are created and granted within a bidding period, appear as regular time-off items and impact your time-off balances for that specific time-off type.

E-mail Notifications of Status Change

WFM sends you e-mail notifications when the status of your time-off requests change. For example, you will receive notifications when:

- Your time-off request is granted.

- Your time-off request cannot be granted and your status in the time-off bidding period is changed to **Waiting**.
- The time interval (set by the bid assignment process) in which you can make changes to your time-off request has expired and your status in the time-off bidding period is changed to **Timed Out** (meaning the bid assignment process has moved on to the next agent's request in the queue).

Wait-Listing

If your time-off request is eligible for autogranting, but there is no appropriate time slot available, WFM will "wait-list" the request until that time becomes available and then autogrant it, (autogrant must be enabled).

WFM uses wait-listing to put into a queue, agents who request unavailable time off, the order of which is determined by the time each request was made. If the time slot becomes available, agents in that queue are granted their requests, in first-come, first served order. Ask your supervisor if this process is automatic or depends on the wait-list and autogrant settings that are specified by the WFM administrator.

To see how many others are present on a timestep's wait list, in the Time Off calendar, click the cursor on that timestep. A date-and-time information box appears, which also displays the label **Wait-List** followed by the number of people who are currently in the queue for time off in that time step.

In addition, the information box displays the label **Time-Off Limit** and the corresponding number for that timestep.

Editing Time-Off Requests

Use the Time Off calendar to edit existing time-off requests, but first, watch the video.

Link to video

To edit time-off requests:

1. Select the check box next to each date for which you want to edit a time-off request.
2. Click **Edit**.
   The Editing Time-Off Items dialog box appears with the Time-Off Limits grid at the top. The dialog displays the time-off requests for the days you selected. By default, all are selected.
3. Clear the check boxes for time-off requests that you do not want to edit.
4. Change the time-off settings for the requests you want to edit.
5. Click **Submit**.
   To discard your changes, click Cancel.

> ### Tip
> You cannot clear (or select) the check box for a time-off type that you can no longer use. (These time-off types appear below the "*—Others—*" legend in the drop-down list box in the Time Off window.)

If WFM successfully processes your requests, the Time Off window reappears and displays your new time-off settings.

You might see a message containing a list of errors. If so, simply click **Back** and correct the errors.

> ### Tip
> You can recall a time-off request.

Deleting Time-Off Requests

Use the Time Off calendar to remove previously made time-off requests, but first, watch the video.

> **Important**
>
> If a time-off request is **Granted**, and the auto-granting feature is off, you cannot use the time-off views to remove the time-off request. Ask a supervisor to make the change for you.

If the auto-granting feature is enabled, then you can remove granted time off that has not passed the auto-granting lead time listed in the balance pane.

For example, if the granted time-off request is three weeks in the future and the lead time is set to two weeks, then the granted time-off request can be removed. However, if the granted time-off request is only one week in the future, then the request cannot be removed because it has passed the lead time.

Link to video

To delete time-off requests:

1. Select the check boxes for the days with time-off requests you want to delete.
2. Click **Delete**.
   The Deleting Time-Off Items window opens, displaying the time-off requests for the days you selected. By default, all are selected.
3. Clear the check boxes for time-off requests that you do ***not*** want to remove your time-off preferences. All selected time-off requests will be deleted.
4. Click **Submit** or, to keep your time-off requests on the calendar, click **Cancel**.
   The Time Off window reappears, displaying your updated time-off settings.

> **Tip**
>
> You cannot clear (or select) the check box for a time-off type that you can no longer use. (These time-off types appear below the "—*Others*—" legend in the drop-down list box in the Time Off window.)

Recalling Time-Off Requests

Use the Time Off calendar to recall existing requests, but first, watch the video.

Link to video

To recall time-off requests:

1. Select the day where you requested the time off.
2. Click **Recall**.
   WFM displays your recall request(s) in the Recalling Time-Off Items window, with a separate line for each day.
3. If you decide not to submit the recall request for a day in the list, clear the check box at the far left of that day's line.
4. In the lower-right corner of this view, click **Submit**.

The recalled time off is marked in the calendar with one of the following statuses:

- **Recalled**—Indicates that the item was completely recalled and no longer affects your schedule.
- **Scheduled, Recalled**—Indicates that your recall request was received, but the item is not yet recalled. The item will remain active and in your schedule until a supervisor removes the time off from the schedule.

If your company uses WFM's notifications, WFM sends a notification to your supervisor and republishes the schedule (if autopublish is enabled) with the time off removed.

Entering Comments

You can enter comments when you make a preference or time-off request. Your supervisor might choose to consider these comments when deciding whether to grant or deny preferences and time-off requests.

To enter comments:

1. While creating, or editing a time-off request, click **Comment....**
2. Enter your comment.
3. Click **OK** to save the comment.
   To close the dialog without saving the comment, click Cancel.

Watch the video Using the Time Off Calendar.

Bidding

Use the schedule bidding window to bid on schedules. You can access a bidding scenario only during the Schedule Bidding Period (the time period between the Start Date/Time and End Date/Time for bidding).

> **Tip**
> You will not see Bidding in the menu bar, if the Administrator in your contact center has not enabled it.

To access a bidding scenario:

1. At any window, click the **Bidding** link on the menu bar.
2. At the Bidding Scenarios View, select a bidding scenario.
   If no bidding scenarios are listed, there are no scenarios currently open for bidding.
3. At the Bidding Assignment Pane, perform any of these tasks:
   - Sort or Filter the view of available shifts.
   - Rank the schedules and bid on them by numbering them 1, 2, 3 and so on. You can view and revise your bids up until the End Date/Time in separate Desired or Unwanted lists.

Bidding Scenarios View

You reached this view by clicking on **Bidding** in the menu bar.

This view displays all schedule scenarios that are available for bidding, and you can open any of those scenarios to view the schedules and assign bids. Each row in this view displays one bidding scenario, and these columns present information about each bidding scenario:

Control	Description
Scenario Name	Displays the name of a bidding scenario.
Bidding End Name	Displays the bidding scenario's bidding end date/time.
Days Remaining	Displays number of remaining days until the scenario closes for bidding.
Scenario Start	Displays the start date for which the schedule will be effective.
Scenario End	Displays the final date for which the schedule will be effective.

Opening a Bidding Scenario

To examine a bidding scenario, click on its link in the Scenario Name column.

The Bidding Assignment pane for that scenario opens.

Bidding Assignment Pane

You reached this pane by clicking on the name of a bidding scenario in the Bidding Scenarios view.

As an agent, you can only access a bidding scenario for a specific period of time, which is known as the bidding window. The bidding window closes on the date and time that are labeled Bidding End Time in the upper left portion of the screen.

To Modify and Navigate the Display:

1. Click one of these controls:

Control	Description
Sort button	Sort the rows by day of the week, earliest shift start, earliest meal start, total weekly paid hours, ascending or descending.
Filter button	Filters the rows by days of the week, days off, shift start, first meal start time.
View drop-down menu	Display schedule information in the grid below, in one of these selected formats: start/end time, shift name, total daily paid hours, meals start/end times.
All button	Display all schedules regardless of how your ranked them (default).
Desired button	Display only the schedules that you ranked as Desired.
Unwanted button	Display only the schedules that you ranked as Unwanted.
Previous *n* button	Display the previous n schedules.
Next *n* button	Display the next page, which contains n schedules (except for the final page, which may contain fewer).

2. Click the **Apply** button, or click **Cancel** to abandon the dialog without making your changes.

To Rank a Schedule:

1. Select the check box in the far right column for each schedule that you wish to affect.
2. Click one of these controls to indicate your bids:

Control	Description
Add to Desired button	Rank the selected schedules by adding them to the Desired view. Immediate results appear, as a ranking number in the Bid column of each selected shift. (These numbers are unique and consecutive, starting with one: 1, 2, 3, 4...)

Control	Description
Add to Unwanted button	Rank the selected schedules by adding them to the Unwanted view. Immediate results appear, as a [bracketed] ranking number in the Bid column of each selected shift. (These numbers are unique and consecutive, starting with one: 1, 2, 3, 4...)
Remove	Remove all selected schedules from the Desired or Unwanted current views. (You cannot remove anything from the All view.)

The Schedules Grid

The grid displays information about the available schedules. The information varies depending on the View selected. Default: **Start/End Times**. The grid columns are:

Grid Column	Description
Name	Displays the schedule name and week numbers if the schedule bid is longer than one week.
Days of the Week	Each column displays schedule information for a day of the week, depending on the View selected. The Views are named (and they display the corresponding named values) for each day's shift and total for the week: • **Shift Start/End Times** • **Shift Names** • **Total Daily Paid Hours** • **Meals Start/End Times** **Note:** Regardless of the View selection, this column can also display the name of full day activity which is not a shift and/or does not have Time defined.
#	Displays the number of instances of this exact schedule that are available to be bid on across the contact center. For example, if the number in this column is 3, then 3 different agents can be granted this particular schedule.
Weekly Totals	Displays the total paid hours for the week, for each schedule.
Bid	Displays your current bid for this particular schedule.
Check box	Displays a check box for each schedule bid. How to use it: • Select a check box to select the schedule on the same line.

Grid Column	Description
	• Click Add to Desired or Add to Unwanted to add the selected schedule to the corresponding list. • Click Remove to remove the selected schedule from the list that it is currently on. • You can select multiple schedules.

Bidding Details View

You reached this view from the Bidding Assignment pane by clicking on one of the schedule names, or on a week within any schedule.

Click on the name of a multiple-week schedule name to display all weeks in that schedule.

Click on a single week within a multiple-week schedule (or on the name of a 1-week schedule) to display a single week.

Understanding the Bidding Details View

The top line of this view displays the schedule name on the left side and the schedule date range on the right side. The columns are:

Column	Description
Date	Shows each date during the week.
Paid hours	Shows how many hours of paid work you are scheduled for on each day.
Schedule details	Shows what activities you are scheduled to perform each day. This column also shows break information.
Scheduled attendance Start time	Shows when you are scheduled to start your shift and the start time for each activity and break during your workday.
Scheduled attendance End time	Shows when you are scheduled to end your shift and the end time for each activity and break during the workday.

If you click on a single week, or if the schedule contains only 1 week, the display will show a single week within the schedule.

If you click on the name of a schedule that contains multiple weeks, the display will show multiple weeks in the schedule.

Bidding Assignment Filter View

You reached this window by clicking the **Filter** button in the Bidding Assignment pane.

Use the Filter dialog to limit the display of available schedules in the Bidding assignment window, in this way: Select days of the week and then a second characteristic which will apply to schedules which have shifts on those days.

1. Select some or all of the Days of the Week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) for each week.
   Your next selection(s) will apply only to schedules which have shifts on those days. Default setting: all days selected.
2. Select one of these three radio buttons:

Radio Button	Description
Show all	Undo all current filtering by disabling all other possible choices. Display all schedules.
By Days Off	Display only schedules which match the full Days Off that you select.
By Shift Start **And First Meal Time** (a check box that is enabled only if By Shift Start is selected)	Display only schedules with shifts that start no earlier than your **Earliest Start Time** setting and no later than your **Latest Start Time** setting, on your selected days. If you select the check box, both fields are required. Also, display only schedules that have shifts with a first meal that starts no earlier than your **Earliest Start Time** setting and no later than your **Latest Start Time** setting. If you select the check box, both fields are required.

3. Click **Submit** to apply your choices, or click **Cancel** to abandon the dialog without applying them.

Bidding Assignment Sort View

You reached this window by clicking the **Sort** button in the Bidding Assignment Pane.

Use the Sort dialog to display the available schedules in the Bidding assignment Window in a special order, in this way:

1. Select a day of the week and then a second characteristic which will apply to schedules with shifts on that day.
2. Select one of these radio buttons:

Control	Description
Day of the Week	Select one day only: Sun, Mon, Tue, Wed, Thu, Fri, Sat.
Earliest Shift Start	Sort by shift start time (default). Days Off are listed after all schedule days with shifts.
Earliest Meal Start	Sort by first meal start time. Schedules which contain shifts without meals are listed after all schedules which contain shifts with meals.
Total Weekly Paid hours	Sort by total weekly paid hours.

3. Select a sorting method: either **Ascending** or **Descending**.
4. Click **Submit**, or click **Cancel** to abandon the dialog without making your changes.

Bidding Assignment Desired View

You reached this view by clicking the **Desired** tab in the Bidding Assignment pane.

Use the **Desired** view to reorder your bids for schedules that you want.

Ranking Your Bids

Your bids are already ranked when you reach this window; that happened when you clicked **Add to Desired** in the **Bidding Assignment** pane. Your most desired bid is numbered 1.

To change a single bid:

1. Select the number in the Bid column box, and enter a different number.

> **Important**
> If you change the rank of one of your bids and click **Apply**, the rest of your bids will be renumbered accordingly.

2. Click **Apply** to implement your change, or **Cancel** to abandon it.

Repeat as necessary to achieve the bid order that you want.

Removing Schedules from the Desired View

To remove one or more shifts from the **Desired** view:

1. Select the check box in the far right column of every schedule that you wish to affect.
2. Click **Remove** to remove the selected schedule(s) from the **Desired** view and set the bid ranking to `0`.
   or
   Click **Unwanted** to move the selected schedule(s) to the **Unwanted** view.

Bidding Assignment Unwanted View

You reached this window by clicking the **Unwanted** tab in the Bidding Assignment Pane.

Use the **Unwanted** view to reorder your bids for schedules that you not want.

Ranking Your Bids

Your bids are already ranked when you reach this view; that happened when you clicked **Add to Unwanted** in the **Bidding Assignment** pane. Your most unwanted bid is numbered 1.

1. Select the number in the Bid column box, and enter a different number.

> **Important**
> If you change the rank of one of your bids and click **Apply**, the rest of your bids will be renumbered accordingly.

2. Click **Apply** to implement your change, or **Cancel** to abandon it.

Repeat as necessary to achieve the bid order that you want.

Removing Shifts from the Unwanted View

To remove one or more shifts from the **Unwanted** view:

1. Select the check box in the far right column of every shift that you wish to remove.
2. Click **Remove** to move the selected shift(s) to the **All** view and set the bid ranking to `0`.
   or
   Click **Desired** to move the selected shift(s) to the **Desired** view.

Configuration

The Configuration window provides access to your personal information, shared transport arrangements, and the schedule exception totals. It has the following three tabs, which are described in details in the related topic:

- Personal Pane
- Shared Transport Pane
- Exception Totals Pane

The Personal Pane

This view displays your personal information: name, employee ID, contract, hire date, site (business unit), team, last login, and depending on whether or not you have changed it, the site or your current time zone.

If you select a time zone, other than the site time zone, the Schedule, Trading, Preferences, and Time Off modules display information, based on the selected time zone. (See an example of the Time Zone drop-down list below).

Themes

This view also offers a graphical choice of screen-display themes, which you might know from other programs as *skins*. Themes apply a different color to various elements on the screen and are displayed as miniature versions of the Schedule view. To switch to a different theme, click on it, and wait for a few moments while WFM applies the new theme.

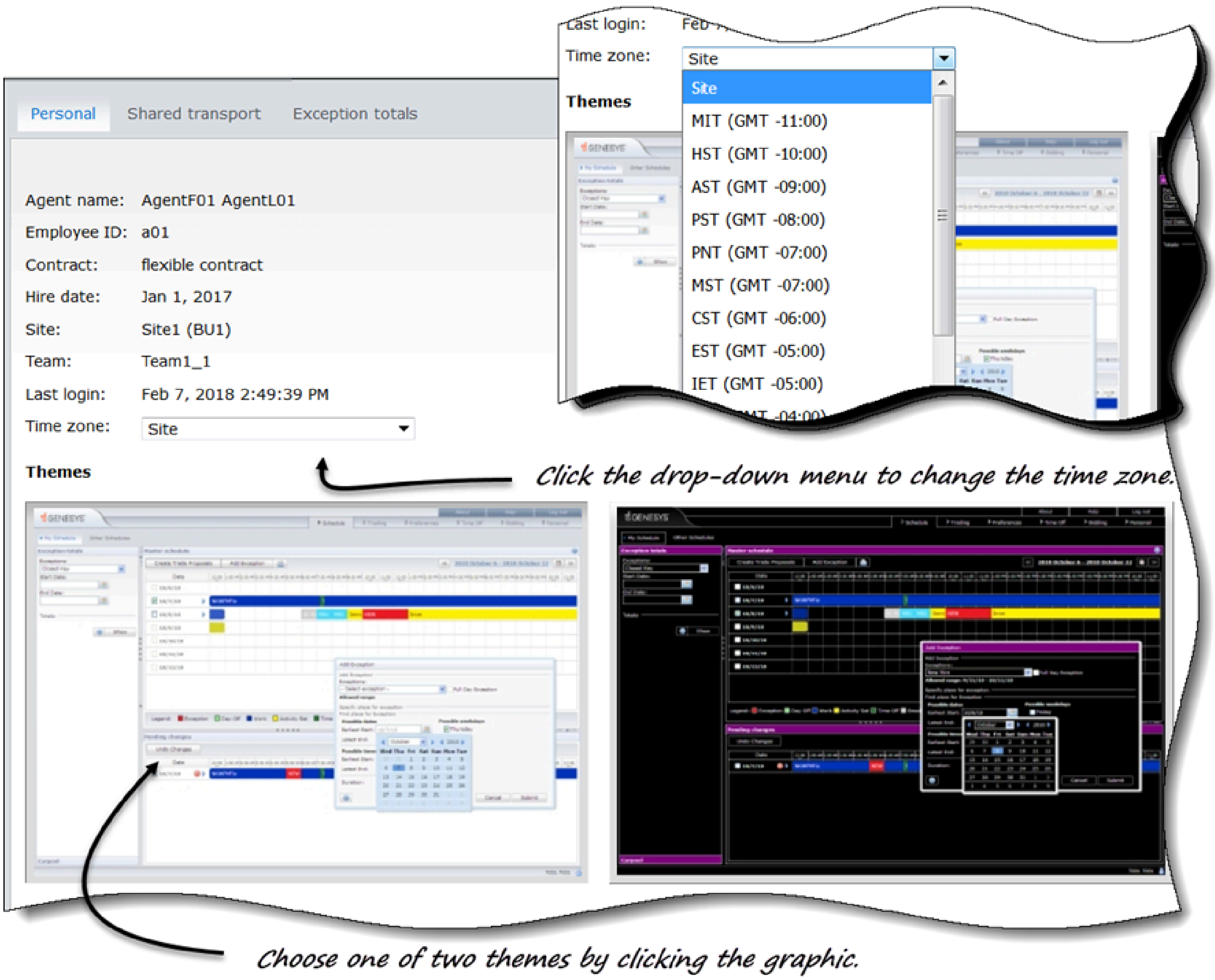


Figure: Time Zone Drop-Down List—Personal Pane

The Shared Transport Pane

Use the Shared Transport pane to manage your participation in a shared transport group. You can use the buttons at the top of the pane to perform the following tasks:

- Create—Use this button to create a new shared transport group.
- Browse shared transport—Use this button to browse existing shared transport groups that you can filter by using the Find button.
- Delete—Use this button to delete selected items in the join requests list.

Create Button

Click the **Create** button to open a dialog box that features the following controls:

Control	Description
Shared Transport Name *field*	Enter the name of the new shared transport group.
Comments *field*	Enter descriptive comments, if any.
Cancel *button*	Exit the dialog box, and take no action.
Create *button*	Create the shared transport group that you have described in the two fields. The dialog box closes, and the group is added as new record in Shared Transport table with the related information for that group. You are automatically added as a participant. **Note:** Creating a new shared transport group deletes all of your pending join requests. You can belong to only one shared transport group at a time.
Help *button*	Display context-sensitive help.

Browse Shared Transport Button

Click the **Browse shared transport** button to open a dialog box that displays a list of existing shared transport groups. This dialog box features the following controls:

Control	Description
Find by *drop-down menu*	Choose Shared Transport Name, Agent's First Name, or Agent's Last Name.
Find by *field*	Enter the text that will be applied to the Find

Control	Description
	criterion. Leave this field empty to find all shared transport groups.
Find *button*	Click to apply the filter. The list of shared transport groups appears below the filter controls, with the following columns:
☐ *check box* icon	Use to select a shared transport group before you click the Join button.
Shared transport *column*	Name of the shared transport group.
Agents *column*	List of the participants in the shared transport group.
Bus *column* (check box)	Specifies a bus as the transportation that is provided by company. (Agents are driven to work by company bus.) Only supervisors can create groups with Bus checked.
Comments *column*	Use to view any comments that are associated with shared transport groups.
Cancel *button*	Click to take no action and exit the dialog box.
Join *button*	Click to submit a Join request, enter comments associated with the agent join request, and close the dialog box.
Help *icon*	Use to open the help topic that describes the Browse Shared Transport dialog box.

Delete Button

The **Delete** button is used to delete the selected agent's join requests. To delete join requests, check appropriate check box and press **Delete**.

You cannot delete a shared transport group, in which the agent is a participant—the check box will be disabled for these groups. However, you can leave your current shared transport by clicking the Leave Transport button under the **Comments** dialog box in the bottom pane. The shared transport is removed from the table and you are no longer a member of that shared transport.

Shared Transport Panes

The Shared Transport pane is divided into two other panes. The top pane includes the following columns that display information about the shared transport groups and join requests that you created:

Control	Description
☐ *check box* icon	Use this check box to select join requests for deletion. It is disabled for the current shared transport group.

Control	Description
Shared Transport	The shared transport group name.
Status	The shared transport group status (open or closed). An open status indicates that this shared transport is open for new requests. A closed status indicates that it is closed to new requests. The Status field also contains the status of the agent's join request (pending or declined).
Bus ☐ *check box* icon	Use to specify a type of shared transport group. The check box indicates the mode of transportation that is used by the shared transport group. When checked, it means a bus (provided by the company) is the mode of transportation. When unchecked, it means a carpool (created by the agents) is the mode of transportation.
Comments	Use to view the text that was entered into the comments box when the shared transport group was created.

The bottom pane displays the details of the selected shared transport item, such as:

- The name of the shared transport group
- The status
- The type of group (For example, if **Bus** is checked, the message "*This is a bus*" is also displayed)
- The names of all group members (including yours) Comments

It also includes the following three buttons, which enable you to perform the following tasks:

- Leave transport—Use this button to remove yourself from the shared transport group, which deletes the shared transport group if you are the only member.
- Join requests—Use this button to accept or decline requests from other agents to join the shared transport group.
- Change properties—Use this button to change the properties of the shared transport group.

> **Tip**
> These buttons are displayed only if your current shared transport group is selected. If a join request is selected, they are not displayed.

Leave Transport Button

Click the **Leave transport** button to open a Confirmation dialog box that features the following controls:

Controls	Description
OK	Confirms the request to leave the shared transport group and closes the Confirmation dialog box.
Cancel	Cancels the request to leave the shared transport group and closes the Confirmation dialog box.

Join Requests Button

Click the **Join requests** button to open a dialog box that features the following controls:

> **Tip**
> You must first belong to a shared transport group.

Controls	Description
This dialog box displays a list of all join requests, with the following columns:	
☐ *check box*	Use to select a request before you click the Accept or Decline button. You can select multiple requests.
Agent	Name of the agent who is requesting to join the shared transport group.
Status	Shows `Pending` for all requests. Accepted/Declined agents are not listed.
Bus *check box* icon	A type of shared transport group. The check box Indicates the mode of transportation that is used by the shared transport group. When checked, it means a bus (provided by the company) is the mode of transportation. When nchecked, it means a carpool (created by the agents) is the mode of transportation.
Comments	Displays any comments that are associated with the Join request.
The Join Requests dialog box features the following controls:	
Accept *button*	Click to approve the selected request(s).
Decline *button*	Click to decline the selected request(s).
Cancel *button*	Click to take no action and exit the dialog box.
 **Help** *icon*	Use to open the help topic that describes the Join Requests dialog box.

Change Properties Button

Click the **Change properties** button to open a dialog box that features the following controls:

Controls	Description
Shared Transport Name *field*	Edit the name of your shared transport group.
Status *radio button*	Select either Open Shared Transport (for new requests) or Close Shared Transport (for new requests).
Comments *field*	Enter or edit comments that are associated with the shared transport group.
Cancel *button*	Click to take no action and exit the dialog box.
Submit *button*	Click to save the current changes to the shared transport group.

Exception Totals Pane

Use the Exception Totals pane to view the totals for a selected exception over a selected date range. The following controls do not define any exceptions; they only filter the display.

Controls	Description
Exceptions *field*	Select an exception type from the drop-down list.
Start Date *field*	Enter a date or select one from the pop-up calendar.
End Date *field*	Enter a date or select one from the pop-up calendar.
Show *button*	Click to display totals (in the Totals field) for exceptions that match the preceding three fields.
Totals *field*	Displays exception, period, and number of minutes on 3 lines.